

**Oracle® US Federal Human Resources**

Workforce Sourcing, Deployment, and Talent Management Guide

Release 11*i*

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# Contents

## Send Us Your Comments

## Preface

## 1 Recruitment and Hiring

<b>Recruitment and Hiring Overview</b> . . . . .	1-1
<b>Recruitment and Hiring</b> . . . . .	1-2
<b>Recruitment Preparation</b> . . . . .	1-3
Recruitment Preparation . . . . .	1-4
Raising a Requisition for a Vacancy . . . . .	1-5
Defining a Recruitment Activity . . . . .	1-5
Viewing Vacancies . . . . .	1-6
<b>Selection Processing</b> . . . . .	1-6
Selection Processing . . . . .	1-7
Applications and Assignments . . . . .	1-7
Applicant Assignment Statuses . . . . .	1-9
Interviews and Other Recruitment Events . . . . .	1-10
Application Termination . . . . .	1-11
Recording an Application Quickly . . . . .	1-11
Entering Full Application Information . . . . .	1-12
Scheduling an Interview . . . . .	1-13
Cancelling an Applicant Record . . . . .	1-14
Updating Applicant Assignments by Group . . . . .	1-14
Rejecting an Application . . . . .	1-15
Running the Requisition Summary Report . . . . .	1-16
<b>Appointment</b> . . . . .	1-16
Appointments and the Hiring Process . . . . .	1-17
Hiring an Applicant (People and RPA Windows) . . . . .	1-19
Rehiring an Ex-Employee . . . . .	1-19
<b>Recruitment Using People Management</b> . . . . .	1-20
Recruitment Using People Management Templates . . . . .	1-21
Entering a New Applicant . . . . .	1-21
Recording an Application . . . . .	1-22
Entering Application Information . . . . .	1-23
Making an Offer to an Applicant . . . . .	1-23

Changing an Applicant's Status to Accepted Offer . . . . .	1-24
Hiring an Applicant . . . . .	1-24
Ending an Application . . . . .	1-25
Reactivating an Application . . . . .	1-25
Terminating an Applicant . . . . .	1-26

## 2 People Management

<b>People Management Overview</b> . . . . .	2-1
<b>People Management</b> . . . . .	2-2
<b>People</b> . . . . .	2-3
People in a Global Enterprise . . . . .	2-4
Tracking People's Roles and Activities. . . . .	2-7
Windows for Maintaining Personal Information . . . . .	2-8
Identifying Employees, Contingent Workers, and Assignments. . . . .	2-9
Person Extra Information Types . . . . .	2-11
Person Record Synchronization . . . . .	2-12
Special Information Types . . . . .	2-16
Finding a Person Using the Find Person Window . . . . .	2-16
Entering a New Person . . . . .	2-17
Entering Additional Personal Information (People Window) . . . . .	2-20
Entering Pictures . . . . .	2-24
Entering and Maintaining Documents of Record . . . . .	2-25
Running the Person Synchronization Report . . . . .	2-26
Summarizing Personnel Data . . . . .	2-26
Deleting a Person from the System . . . . .	2-27
Setting Up Special Information. . . . .	2-27
Running the Federal Special Information Types Process . . . . .	2-28
Enabling Special Information Types. . . . .	2-28
Entering Special Information. . . . .	2-29
<b>Contracts</b> . . . . .	2-29
Contracts . . . . .	2-30
Creating Contract Statuses. . . . .	2-30
Defining Contract Letter Types. . . . .	2-31
Entering Contracts . . . . .	2-31
Managing Contracts . . . . .	2-33
Generating and Printing Contracts . . . . .	2-34
<b>Employees</b> . . . . .	2-35
Employee Assignment . . . . .	2-36
Employment Information . . . . .	2-37
Employment History . . . . .	2-38
Entering Payment Methods for an Employee Assignment . . . . .	2-39
Entering Previous Employment Details . . . . .	2-40
<b>Contingent Workers</b> . . . . .	2-41
Contingent Workers . . . . .	2-42
The Contingent Worker Assignment . . . . .	2-45



Contingent Worker Suppliers . . . . .	2-47
US Federal Contingent Workers . . . . .	2-48
Processing US Federal Contingent Worker Information . . . . .	2-48
Defining a Combination of Assignment Rate Type and Basis . . . . .	2-50
Entering Assignment Rates for Contingent Worker Assignments . . . . .	2-51
Starting a Placement for an Ex-Employee or Ex-Contingent Worker . . . . .	2-51
<b>Workforce Information Management . . . . .</b>	<b>2-52</b>
Assignment Statuses . . . . .	2-53
Assignment Status Types . . . . .	2-55
Assignment Extra Information Types . . . . .	2-56
Defining Assignment Statuses (Assignment Window) . . . . .	2-57
Entering Additional Assignment Details (Assignment Window) . . . . .	2-58
Entering Additional Employment Information . . . . .	2-61
Entering a New Assignment . . . . .	2-62
Changing Assignment Information . . . . .	2-63
Removing Title from Person Search Lists . . . . .	2-63
Using Mass Applicant Assignment Update . . . . .	2-63
Reviewing and Correcting Mass Assignment Update Errors . . . . .	2-66
Purging Transaction Data . . . . .	2-66
<b>Workforce and Applicant Termination . . . . .</b>	<b>2-67</b>
Workforce and Applicant Termination . . . . .	2-68
Terminating an Assignment . . . . .	2-69
Ending a Placement . . . . .	2-70
Canceling a Termination . . . . .	2-71
Updating an Employee's Final Process Date . . . . .	2-71
<b>Entering Contact Information . . . . .</b>	<b>2-72</b>
Contact Information Overview . . . . .	2-73
Adding a City to the Database . . . . .	2-73
Entering People's Addresses at Sites without Oracle Payroll . . . . .	2-74
Entering People's Addresses at Sites with Oracle Payroll . . . . .	2-75
Adding Telephone Information (Phone Numbers Window) . . . . .	2-76
Entering Communication Delivery Methods . . . . .	2-77
Entering Next of Kin and Other Contacts . . . . .	2-77
<b>Using People Management Templates . . . . .</b>	<b>2-80</b>
Folders for Saved Search Criteria or Results . . . . .	2-81
Template Windows User Interface . . . . .	2-81
Finding a Person or Group of People . . . . .	2-85
Managing Your Group Folders . . . . .	2-86
Entering Contingent Worker Information . . . . .	2-87
Maintaining Contingent Worker Information . . . . .	2-87
Activating an Assignment . . . . .	2-88
Suspending an Assignment . . . . .	2-88
Checking for Duplicate People . . . . .	2-89
Sending a Workflow Notification . . . . .	2-90
Entering Visa Related Data . . . . .	2-90

Saving Search Criteria or Search Results to a Folder . . . . .	2-91
Deleting a Folder . . . . .	2-92
Creating a New Group Folder . . . . .	2-92
<b>Reporting on the Workforce . . . . .</b>	<b>2-93</b>
The Workforce Headcount Report Set . . . . .	2-94
New Hire Reporting . . . . .	2-95
Running the Full Personal Details Report Set. . . . .	2-97
Running the Employee Summary Report . . . . .	2-97
Running the Worker Organization Movements Report . . . . .	2-97
Running the Assignment Status Report . . . . .	2-98
Running the Head Count Detail Report . . . . .	2-99
Running the Workforce Count Reports . . . . .	2-100
Running the Duplicate Person Report . . . . .	2-101
Running the Full Person Details Report . . . . .	2-101
Running the Person Full History Report. . . . .	2-101
Using the People Folders . . . . .	2-102
Listing Assignments Using the Assignments Folder. . . . .	2-103
Listing Assignments Using the List Assignments Window . . . . .	2-104
Using the List People by Assignment Window . . . . .	2-104
Listing Workforce by Position . . . . .	2-104
Listing Workforce by Organization . . . . .	2-106
Listing People by Special Information . . . . .	2-106
Viewing a Worker's Assignment History . . . . .	2-107
Setting up New Hire Reporting . . . . .	2-107
Running the New Hire State Report . . . . .	2-108
Running the New Hire State Magnetic Media Report . . . . .	2-109
<b>Workforce Intelligence Key Concepts for People Management . . . . .</b>	<b>2-109</b>
Key Concepts for People Management Intelligence . . . . .	2-110
<b>Workforce Intelligence for People Management . . . . .</b>	<b>2-112</b>
Employee Anniversary and Birthday Detail Workbook . . . . .	2-113
Employee by Supervisor Status Workbook. . . . .	2-114
Employee Composition Analysis Workbook . . . . .	2-115
Employee Hired or Terminated Detail Workbook. . . . .	2-116
Employee Mailing Address (United States Specific) Detail Workbook . . . . .	2-117
Employee Organization Transfer Detail Workbook . . . . .	2-118
Employee Primary Assignment Detail Workbook. . . . .	2-119
Employee Termination Detail Workbook . . . . .	2-120
Employee Termination with Comments Detail Workbook . . . . .	2-121
Human Resource Setup Analysis Workbook . . . . .	2-122
Person/Assignment History Detail Workbook . . . . .	2-124

### 3 Request for Personnel Actions

Requests for Personnel Action Overview. . . . .	3-1
Requests for Personnel Action . . . . .	3-3
RPA Process . . . . .	3-5

Request for Personnel Action (RPA) Window . . . . .	3-6
RPA Actions Based on Roles . . . . .	3-6
Extra Information and the RPA. . . . .	3-8
Pay Calculation on an RPA . . . . .	3-9
Restricted RPA Form . . . . .	3-12
The RPA Routing History . . . . .	3-13
Productivity Data . . . . .	3-14
Processing a Request for Personnel Action (RPA) . . . . .	3-15
Setting Effective Dates on the Request for Personnel Action (RPA) . . . . .	3-17
Entering Remarks on an RPA . . . . .	3-17
Entering Legal Authority Codes (LACs) on an RPA . . . . .	3-18
Enclosing Attachments and Notes to an RPA. . . . .	3-19
Processing Dual Actions . . . . .	3-19
Changing NOA Families on an RPA . . . . .	3-20
Entering Productivity Data . . . . .	3-21
Creating a Restricted RPA . . . . .	3-21
<b>RPA Approve, Update, and Print RPAs.</b> . . . .	3-22
RPA Update to the HR Database . . . . .	3-23
Refreshed Data and Data Maintenance . . . . .	3-24
RPA Signatures and Approvals. . . . .	3-24
Printed Notification of Personnel Action. . . . .	3-25
Signing an RPA . . . . .	3-26
Approving an RPA . . . . .	3-26
Displaying Refreshed RPA Information . . . . .	3-26
Processing Your Own RPA . . . . .	3-27
Printing the RPA . . . . .	3-27
Printing the Notification of Personnel Action. . . . .	3-28
<b>Future, Retroactive, Cancel, Correction Actions</b> . . . . .	3-29
Retroactive and Future Actions . . . . .	3-30
Correction Actions . . . . .	3-31
Processing Future Actions . . . . .	3-31
Scheduling Future Dated RPA Actions . . . . .	3-32
Processing Retroactive Actions . . . . .	3-33
Canceling an NPA . . . . .	3-34
Canceling or Correcting Future Approved Actions . . . . .	3-34
Correcting an NPA . . . . .	3-36
<b>Other RPA Actions</b> . . . . .	3-37
Retained Grade Actions . . . . .	3-38
Change in Hours, Work Schedules, or Duty Station . . . . .	3-40
Processing Not to Exceed Actions . . . . .	3-41
Processing Name Change Actions . . . . .	3-41
Processing Conversion Actions . . . . .	3-42
Verifying or Changing FEGLI Codes . . . . .	3-43

## 4 Workforce Management Mass Actions

<b>Workforce Management Mass Actions Overview</b> . . . . .	4-1
<b>Workforce Management Mass Actions</b> . . . . .	4-5
<b>Mass Transfers and Realignments</b> . . . . .	4-5
Error Handling . . . . .	4-6
Mass Transfers . . . . .	4-6
Processing Mass Actions . . . . .	4-6
Entering Remarks and Legal Authority Codes . . . . .	4-8
Running the Final Mass Action . . . . .	4-9
Printing Mass Action Reports . . . . .	4-10
Setting up a Workflow Administrator's Groupbox . . . . .	4-10
Deleting Invalid Mass Actions . . . . .	4-11
Processing a Mass Transfer Out . . . . .	4-11
Processing a Mass Transfer In . . . . .	4-13
Processing Mass Realignments . . . . .	4-15
<b>Reduction in Force</b> . . . . .	4-16
Retention Register Folder . . . . .	4-17
Producing a Retention Register . . . . .	4-17

## 5 Talent Management

<b>Talent Management Overview</b> . . . . .	5-1
<b>Talent Management Requirements</b> . . . . .	5-5
<b>Competencies</b> . . . . .	5-7
Competencies Overview . . . . .	5-8
Proficiency Levels . . . . .	5-9
Rating Scales . . . . .	5-10
Competency Measurement . . . . .	5-11
Competency Types . . . . .	5-14
Creating a Rating Scale . . . . .	5-15
Creating a Competency . . . . .	5-16
Querying a Competency . . . . .	5-19
Uploading Third-Party Competency Information . . . . .	5-19
Grouping Competencies into Types . . . . .	5-20
<b>Competency Requirements</b> . . . . .	5-20
Competency Requirements . . . . .	5-21
Defining Competency Requirements - Core or Generic Competencies . . . . .	5-22
Defining Competency Requirements - No Core Competencies . . . . .	5-23
Copying Competencies . . . . .	5-24
Viewing Competency Requirements at Organization, Job or Position Level . . . . .	5-25
<b>Competency Profiles</b> . . . . .	5-25
Competency Profiles . . . . .	5-26
Suitability Matching . . . . .	5-27
Creating a Competency Profile . . . . .	5-28
Entering Work Choices for a Person (Work Choices Window) . . . . .	5-30
<b>Workforce Performance Management Overview</b> . . . . .	5-30

Workforce Performance Management Overview . . . . .	5-31
Setting Up Workforce Performance Management . . . . .	5-34
<b>Performance Management Plans</b> . . . . .	5-35
Performance Management Plans . . . . .	5-36
Updating Performance Management Plans . . . . .	5-39
Running the Mass Appraisal Creation for WPM Program . . . . .	5-42
<b>Objectives</b> . . . . .	5-42
The Objectives Library . . . . .	5-43
Creating Objectives . . . . .	5-44
Updating Objectives . . . . .	5-46
Measuring Objectives . . . . .	5-47
Cascading Objectives . . . . .	5-48
Setting Objectives in Parallel . . . . .	5-51
Allocating Objectives to Workers Automatically . . . . .	5-53
Sharing and Aligning Objectives . . . . .	5-55
Tracking Objectives . . . . .	5-56
Personal Scorecards . . . . .	5-57
<b>Workforce Performance Management Task Lists</b> . . . . .	5-59
Manager Performance-Management Tasks . . . . .	5-60
Worker Performance-Management Tasks . . . . .	5-63
<b>Qualifications</b> . . . . .	5-65
Qualification Types . . . . .	5-66
Creating Qualification Types . . . . .	5-66
Entering Qualifications . . . . .	5-68
Creating Schools and Colleges . . . . .	5-70
Entering Schools and Colleges Attended . . . . .	5-70
<b>Appraisals</b> . . . . .	5-70
Appraisals Overview . . . . .	5-71
The Appraisal Process . . . . .	5-74
An Example Appraisal Process . . . . .	5-77
Appraisals Workflow Notifications . . . . .	5-80
Setting Up the Appraisal Process . . . . .	5-84
<b>Appraisal and Assessment Templates</b> . . . . .	5-86
The Appraisal Template . . . . .	5-87
Assessment Templates . . . . .	5-89
Assessing Competencies and Objectives . . . . .	5-91
Viewing Appraisal Templates . . . . .	5-95
Viewing Competency Assessment Templates . . . . .	5-95
<b>Career and Succession Planning</b> . . . . .	5-95
Career and Succession Planning . . . . .	5-96
Career Paths . . . . .	5-98
Career and Succession Plan Modeling Based on Jobs . . . . .	5-99
Career and Succession Plan Modeling Based on Positions . . . . .	5-99
Defining Career Paths . . . . .	5-100
Modeling Career and Succession Plans Based on Jobs . . . . .	5-100

Modeling Career and Succession Plans Based on Positions . . . . .	5-101
<b>Skills Matching</b> . . . . .	5-101
The Special Information Approach to Skills Matching . . . . .	5-102
Running the Skills Matching Report . . . . .	5-104
<b>Event and Attendance Administration</b> . . . . .	5-104
Event and Attendance Administration . . . . .	5-105
Entering Performance Ratings . . . . .	5-106
Entering an Employee Review . . . . .	5-106
Creating an Event . . . . .	5-107
<b>Workforce Intelligence Key Concepts for Competencies, Qualifications and Development</b>	5-107
Key Concepts for Competencies, Qualifications, and Development Intelligence . . . . .	5-108
<b>Workforce Intelligence for Competencies, Qualifications and Development</b> . . . . .	5-108
Competence (Skill) Development Detail Workbook . . . . .	5-109
Appraisal Detail Workbook . . . . .	5-110
Competence Updates after Appraisal Workbook . . . . .	5-111

## **A Windows and their Navigation Paths**

## **B Reports and Processes in Oracle HRMS**

## **HRMS Glossary**

## **Index**

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# Send Us Your Comments

## **Oracle US Federal Human Resources Workforce Sourcing, Deployment, and Talent Management Guide, Release 11i**

**Part No. B15545-02**

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- Did you understand the context of the procedures?
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- Do you need different information or graphics? If so, where, and in what format?
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# Preface

## Intended Audience

Welcome to Release 11i of the *Oracle US Federal Human Resources Workforce Sourcing, Deployment, and Talent Management Guide*.

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

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

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

- Oracle Self-Service Web Applications.

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

- The Oracle Applications graphical user interface.

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

See Related Information Sources on page xiv for more Oracle Applications product information.

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## Structure

- 1 Recruitment and Hiring**
- 2 People Management**
- 3 Request for Personnel Actions**
- 4 Workforce Management Mass Actions**
- 5 Talent Management**

### **A Windows and their Navigation Paths**

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

### **B Reports and Processes in Oracle HRMS**

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

### **HRMS Glossary**

## Related Information Sources

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**

### **Oracle HR Intelligence Daily Business Intelligence for HRMS User Guide**

This guide describes the dashboards and reports available for HR Line Managers, Chief HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

### **Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide**

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

### **Oracle E-Business Intelligence Daily Business Intelligence User Guide**

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

### **OA Personalization Framework and OA Extensibility Framework**

Learn about the capabilities of the 11.5.10 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, recording and managing the workforce, processing Request for Personnel Actions and mass actions, 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 compensation. For example, read how to process compensation and awards, set up automated step increases, and federal benefits such as Federal Health Employee Benefits and Thrift Savings Plans. You can also learn about managing leave and absences, and reporting on compensation.

### Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

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

### Oracle Human Resources Management Systems Implementation Guide

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

### Oracle Human Resources Management Systems FastFormula User Guide

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

### Oracle Self-Service Human Resources Deploy Self-Service Capability Guide

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

### Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

### Implementing Oracle Approvals Management

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

### Oracle iRecruitment Implementation Guide

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

### Oracle Learning Management User Guide

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

### Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

### Oracle Time and Labor Implementation and User Guide

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

## **Installation and System Administration**

### Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also

introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

### Installing Oracle Applications

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

### Upgrading Oracle Applications

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

### "About" Document

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

### Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, Auto Patch, 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.





# Recruitment and Hiring

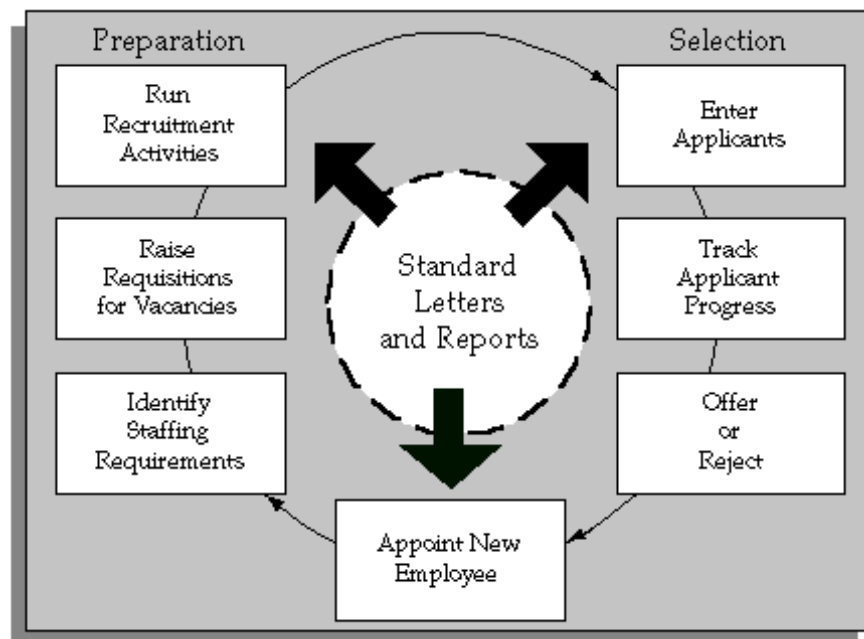
## Recruitment and Hiring Overview

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

### Oracle HRMS and the Recruitment Cycle

Recruitment follows a familiar cycle of tasks across most enterprises. The following graphic depicts the recruitment cycle:

*The Recruitment Cycle*



An analysis of your own detailed working practices will help you decide whether to use Oracle HRMS at a basic or an advanced level within each area of the recruitment cycle. You can identify the sequence of tasks your users perform to design the recruitment task flows.

Using Oracle HRMS, you can manage the phases of the recruitment cycle:

- **Recruitment Preparation:** Identify vacancies in your agency and create recruitment activities such as posting the positions.

- **Selection Process** : Receive and process applications and issue offer or reject letters. You can define your own stages of the selection process and track applicants' progress.

## Recruitment Using Oracle iRecruitment

You can use Oracle Self-Service Human Resources (SSHR) to hire successful applicants into your enterprise. You can configure SSHR's hire functionality to suit your business needs. For example, you can include only the modules you need, such as Personal Information and Employee Pay in your SSHR hire process. You can use the Applicant Hire function in SSHR to hire applicants created in Oracle HRMS and Oracle iRecruitment. To work with Oracle SSHR, you must purchase the license from Oracle. For information on licenses contact your Oracle sales representative.

## Reporting on Recruitment

Oracle HRMS, Oracle HRMSi, and Oracle iRecruitment provide a range of reports to track your recruitment process. For example:

- Oracle HRMS offers the Full Applicant Details report, listing the listing the person's applications and interviews.
- Oracle iRecruitment offers the Applicant Efficiency report to show the average amount of time it takes to fill a vacancy.

For more information, see: Reports and Processes in Oracle HRMS, page B-1

## Key Concepts

To effectively use Oracle HRMS for recruitment management, see:

- Applications and Assignments, page 1-7
- Applicant Assignment Statuses, page 1-9

## Recruitment and Hiring

Oracle Human Resources gives you flexible control over the generation of standard letters to applicants at different stages of the recruitment process.

### How can you match applicants to vacancies?

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

### How can you manage the interview process?

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

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

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

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

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

### **How can you manage the hiring process?**

By processing a Request for Personnel Action, you can convert your applicants or ex-employees to new employees with the minimum of effort.

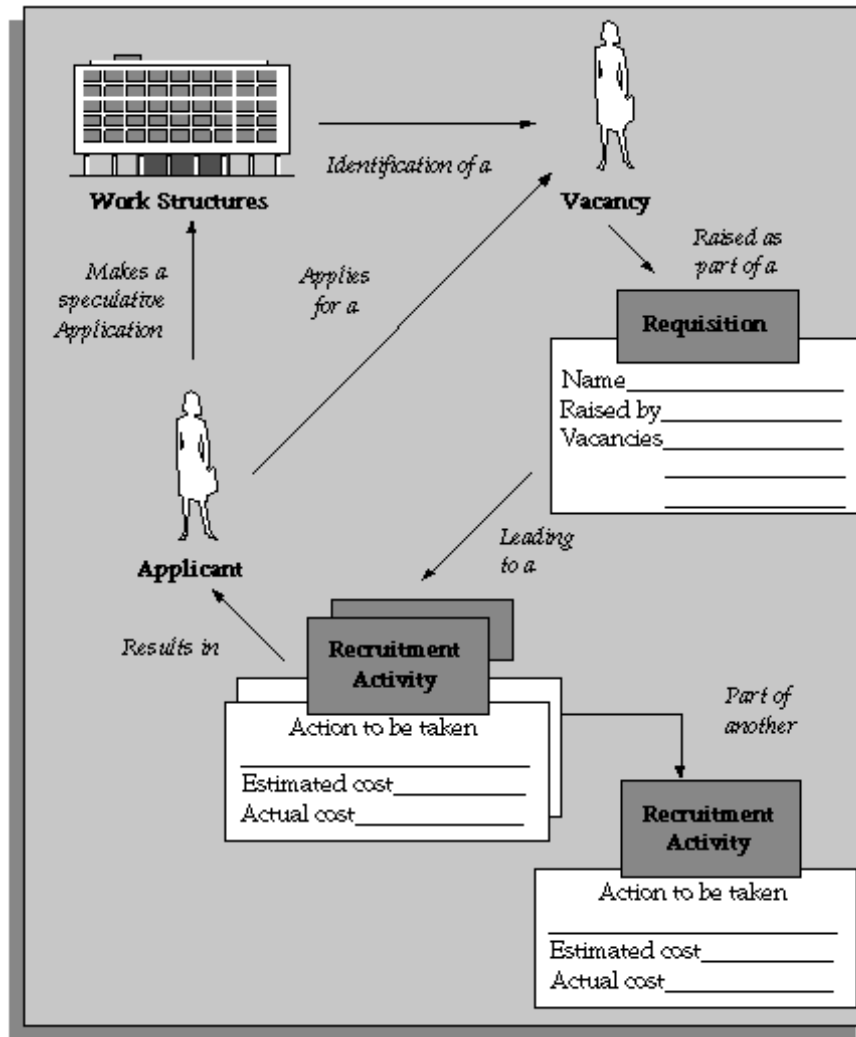
In addition, the hiring process provides you with validation. For example, you cannot rehire an ex-employee if the final process date for the previous employment is still blank. This validation ensures that the information held in the database is always correct and datetracked.

# Recruitment Preparation

## Recruitment Preparation

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

### Recruitment Preparation



## Identification of Staff Requirements

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

## Vacancy Requisitions

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

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

## Raising a Requisition for a Vacancy

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

### To raise a requisition for a vacancy:

1. Enter the requisition and save it before beginning to define the vacancy.
2. Enter a name and number of openings for the vacancy.
3. Optionally enter a description and select a status.
4. You can select one or more assignment components to define the vacancy.
5. Optionally enter the name of the recruiter.

**Note:** You can update the recruiter field to change the recruiter and the recruiter's id at a later date if you want.

6. Optionally enter the budget measurement unit and value for the vacancy. The value you enter is for all the openings for that vacancy. For example, your vacancy could have the budget measurement unit of Headcount and a value of 2. If the number of openings for the vacancy is 4, each opening effectively has a Headcount of 0.5.

**Note:** If you decide to update vacancy details at a later date, the changes you make are reflected in existing applicant assignments for the specified vacancy.

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

## Defining a Recruitment Activity

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

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

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

### To define recruitment activities:

1. Enter the details of the recruitment activity.  
  
You can enter the name of a 'parent' recruitment activity in the Within Recruitment Activity region, if the activity you are defining is part of a campaign.
2. Choose the Recruiting For button to select one or more vacancies to associate with the activity.

## Viewing Vacancies

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

### To view vacancies:

1. Enter selection criteria in any of the fields in the top half of the window.  
  
Leave all these fields blank to see all vacancies in your Business Group.
2. Choose the Find button to see the vacancies that correspond to the criteria you have entered.

The **Initial** field shows the number of openings recorded in the vacancy. The **Current** field shows the number of unfilled openings at your effective date (that is, Initial *minus* number of employees hired into the vacancy).

The **Applicant** field displays the number of applicants with the status Active Applicant, First Interview, or Second Interview (or your user status equivalents). The **First Interview, Second Interview, Offers, and Accepts** fields show the number of applicants with these (or equivalent user) statuses. The **Hires** field shows the number of employees hired to fill the openings of this vacancy at your effective date.

The **Budget Unit** and **Budget Values** fields display the budget type (such as Headcount) and value recorded for the vacancy.

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

# Selection Processing

## Selection Processing

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

The tasks involved in selection processing include:

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

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

## Applications and Assignments

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

- It speeds up hiring the successful applicant since most of the important information is already on the system.
- It makes it easy to track several applications from one applicant as separate assignments.

## Additional Application Information

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

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

See: Worker Development, page 5-26

- Use attachments to hold free text information.
- Set up segments of the Additional Application Details descriptive flexfield to hold the information you require.

See: User Definable Descriptive Flexfields, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

- Set up Special Information Types to hold skills information to use for skills matching.

See: Special Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

## Application Entry Methods

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

- Quick entry using the Applicant Entry window. This enables you to enter basic person information and a single assignment for an applicant. To make this window quick and easy to use, you can only enter one address and one assignment for the applicant.
- Detailed entry using the People window and the Application window. This enables you to enter an application if you need to record multiple assignments for an applicant, enter Government Extra Information, record more than one address for an applicant, or update applicant information.

## Back-to-Back Applications

Oracle HRMS supports back-to-back applications where ex-applicants can apply for a job a day after their previous application ends. For example, you terminate an applicant on 31-Jan-2004 (applicant now becomes ex-applicant). This applicant can submit a new application on 01-Feb-2004.

## Suitability Matching

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

See: Person Search, *Oracle iRecruitment Implementation Guide*

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

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

## Applicant Assignment Group Updates

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

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

## Updating Vacancies

You can update vacancy details in the Requisition and Vacancy window and the changes you make are automatically applied to all existing applicant assignments for the specified vacancy.



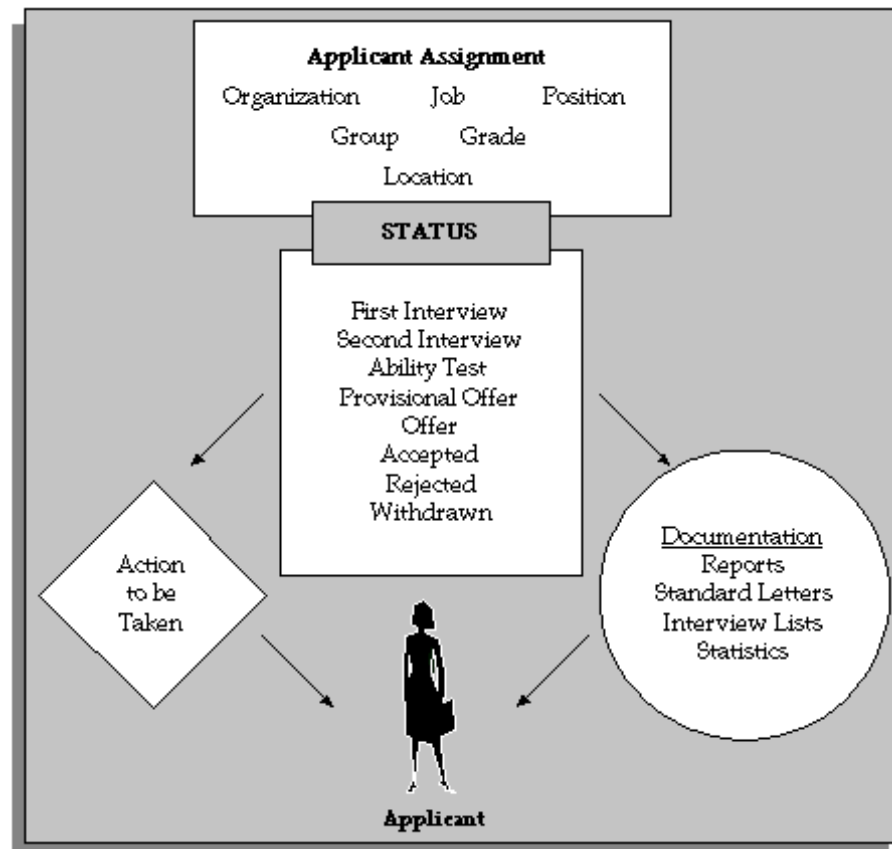
## Full Applicant Details Report

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

## Applicant Assignment Statuses

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

### *The Applicant Assignment and Its Status*



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

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

**Note:** To use the RPA to process an Appointment action for an applicant, the applicant must have an Accepted status.

- *Terminate Application.* Use this status to end an applicant's assignment. You can only do this if the applicant has one or more other assignments in progress.

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

On your system, you can give these statuses different names (called User Statuses), appropriate to your enterprise.

See: Defining Assignment Statuses, page 2-57

## Primary Applicant Assignment Statuses

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

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

- Application
- Applicant Interview
- Terminate Applicant

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

## Secondary Applicant Assignment Statuses

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

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

## Interviews and Other Recruitment Events

### Interviews

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

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

See: Scheduling an Interview, page 1-13

### Recruitment Events

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

See: Event and Attendance Administration, page 5-105

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

## Applicant and Interview Reports

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

See: Running the Requisition Summary Report, page 1-16

## Application Termination

If you have rejected an applicant assignment, you can simply update its status to Terminate Application. However, an applicant must be left with one active assignment. To reject an applicant's last assignment, you must terminate the applicant. Terminating the applicant updates their person type to Ex-applicant. See: Workforce and Applicant Termination, page 2-68

## Recording an Application Quickly

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

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

### To record an application quickly:

1. Select a title and a gender for the applicant.
2. Select the person type you want to use for this applicant. The list of available person types shows all the user person types that can be used to identify applicants.
3. Enter the applicant's name and an identifying number recognized by the system.

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

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

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

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

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

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

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

7. You can enter the name of the applicant's current employer.
8. You can select a recruitment activity. If there is only one vacancy for the activity, the vacancy details appear automatically.
9. If you select a vacancy, applicant assignment information is displayed from the vacancy record. You can add to this information or change it. However, if you change it, the vacancy field clears.
10. If you do not select a vacancy, you can enter assignment information in the Vacancy Applied For region. If you do not enter an organization, it defaults to the Business Group.
11. Select a status for the application. By default a new application has the status Active Application (or an equivalent user status defined on your system).
12. Save your work.

If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: *Multiple Person Records, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

## Entering Full Application Information

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

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

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

See: *Applicant Assignment Statuses, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

See: *Adding Lookup Types and Values, Oracle HRMS Configuring, Reporting, and System Administration Guide*

### To enter an application in full:

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

See: *Entering a New Person, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

3. Open the Application window. If you change the Date Received, this changes the effective start date for the applicant. You can enter the date you expect to hire the new recruit.

You cannot enter a Termination date in this window. You must use the Terminate Applicant window.

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

5. If the application is for a specific vacancy, select the recruitment activity and vacancy. Assignment information from the vacancy is displayed. You can add more assignment details.
6. Select an applicant assignment status and the reason for giving this status. The applicant assignment status is the key to processing the application.
7. Optionally you can enter information, in the tabbed regions, about the following:
  - The recruiter who is responsible for handling the application
  - The supervisor of the assignment and the supervisor assignment number
  - The standard conditions and probation period for the assignment
  - The source of the application, such as the type of recruitment activity, or the organization that recommended the applicant, or the employee who referred the application
  - The employment terms under which the applicant would be hired, such as the contract or collective agreement that would be applicable

**Note:** If you update the applicant assignment in the Assignment window, further changes made in the Requisition and Vacancy window are not applied to the applicant assignment.

## Scheduling an Interview

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

You perform this task using the Applicant Interview window.

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

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

### To schedule applicant interviews:

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

You can also select a location and enter times and an end date. If you select a location that has a time zone associated with it, the Timezone field displays the time zone with that location, regardless of your location.
2. If you want to associate an applicant assignment status change with the interview, enter it in the New Status field. This creates a datetracked update to the applicant assignment.

You cannot enter a status when:

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

## Cancelling an Applicant Record

If you have entered an application in error for a person, you can cancel the applicant record from the Application window or the People window.

You are only able to delete an applicant record if there are no future-dated person changes and the person existed in the application prior to becoming an applicant. To remove an applicant record for a person who has not existed in the application prior to becoming an applicant you should delete the entire person record.

You can only cancel an applicant record if your System Administrator has given you access to the functionality using the HR: Cancel Application profile.

### To cancel an application in the Application window:

1. Query the person's records, if they do not already appear.
2. Ensure the cursor is outside the Assignment block.
3. Choose Delete Record to cancel the applicant record.

**Note:** This action will delete all applicant assignments and will remove any reference to the person being an applicant. It will also delete any changes made to personal information after the applicant record received date. If you want to reapply these changes you must make a note of them before cancelling the applicant record.

4. Save your work.
5. Close the Application window.
6. Re-query the person's records in the People window to view the changes.

### To cancel an application in the People window:

1. Query the person's records, if they do not already appear.
2. Select Cancel Application in the Action field.
3. Save your work.

## Updating Applicant Assignments by Group

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

### To update a group of applicant assignments:

1. Select Find from the Query menu to open the Find Applications window. Enter selection criteria for the group of applicants you want to update and choose the Find button.
2. Do one of the following:
  - If you want to update all or most of these applicant assignments, choose the Select All button. Then uncheck the Mark check box for any assignments that you do not want to update.
  - If you want to update less than half of this group of assignments, check the Mark check box for each assignment you want to update.

3. Choose the Update button.
4. In the Update window:
  - If you want to update the status of the selected assignments, select the new status.
  - If you want to refer these applicants to a new recruiter, select the name of the Recruiter.
5. Choose OK to effect the update.

## Rejecting an Application

If you want to terminate a single application from an applicant with multiple applications you can do this by updating the applicant assignment status to Terminate Application.

If you want to terminate all applications for an applicant you do this by terminating the applicant in the Termination Application window.

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

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

If you have entered an application in error, you can simply cancel the application. This will delete the application, and correct the person record to remove reference to applicant status.

See: Canceling an Applicant Record, page 1-14

### To terminate an applicant:

1. Enter the termination date.
  2. Enter the status Terminate Application, or your User Status equivalent.
- This is not required, but you might use it to trigger generation of a rejection letter.

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

**Note:** This status is not recorded on the applicant assignment, so it is not displayed if you re-query the termination.

3. Select a user person type in the Type field.

**Note:** The Type field is only enabled when the termination date has been entered in the Terminated field. When you enable the Type field it is populated by the default value for your system person type of Ex-applicant.

4. If you want to record the reasons for rejecting applicants, select a reason.
5. Choose the Terminate button.

### Canceling a Termination

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

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

## Running the Requisition Summary Report

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

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

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

You run reports from the Submit Requests window.

### To run the Requisition Summary Report:

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



# Appointment

## Appointments and the Hiring Process

The appointment process takes the applicant from the recruitment process to employee administration where the initial tasks include entering terms and conditions and payroll information.

If you are an Oracle US Federal HRMS user, you use the Request for Personnel Action (RPA) to appoint employees.

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

## Hire Dates and Future-Dated Changes

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

If you make future-dated changes to an applicant's details, such as changing their name, and you subsequently hire the person, the earliest hire date you can enter is the day following the date of the last change. The hire date can, of course, be a future date (providing it is at least 1 day after the date of the last change). For example, if you received an application on January 10th and you changed the applicant's details using future dates, say on January 22nd and February 10th, and you subsequently hire the applicant, the earliest hire date you can enter is February 11th (the date of the **last** change plus one day).

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

## Back-to-Back Employment and Placements

Back-to-back employment and placements occur when a previous period of employment or a previous placement ends 1 day before a new period of employment or a new placement begins.

Oracle HRMS supports back-to-back employment and placements even where there is a difference in person types. That is, an ex-employee can begin a placement on the day following termination of their employment, and an ex-contingent worker can begin employment on the day following the end of their placement.

An ex-employee starting new employment or a placement on April 1st must have an actual termination date **and** a final processing date (for payroll processing) for their previous employment of March 31st. (If your enterprise does not have Oracle Payroll, the final processing date automatically defaults from the actual termination date).

An ex-contingent worker starting employment or a new placement on April 1st must have an actual termination date of March 31st for their most recent placement.

In both cases, there can be no future-dated changes.

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

## Earliest Hire Dates

- An applicant's earliest hire date is either 1 day after you accept the application or the day after the last of any future-dated changes, whichever is later.
- An ex-employee's earliest hire date is either 1 day after the final process date for the previous employment or the day after the last of any future-dated changes, whichever is later. For back-to-back employment, the final process date must be the actual termination date, and there can be no future-dated changes.

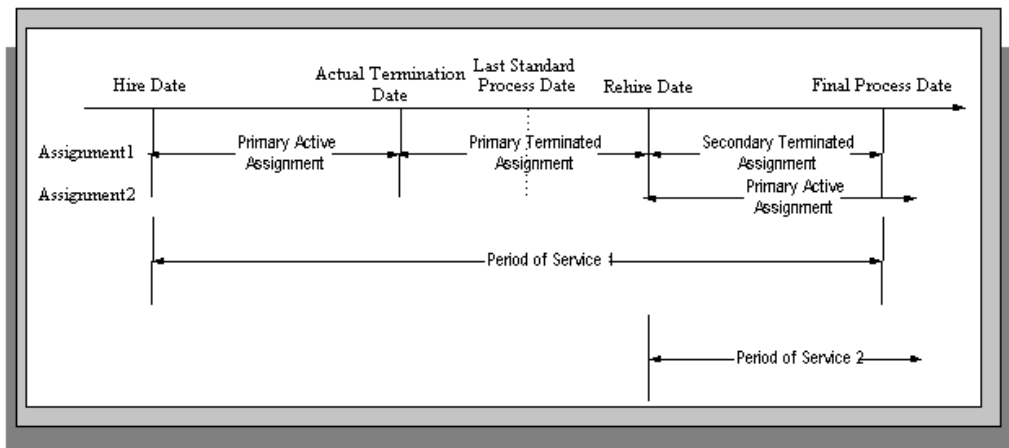
**Note:** US and Russian Payroll users can rehire ex-employee before the final process date. See: Rehire Before Final Process Date, page 1-18

- An ex-contingent worker's earliest hire date is either 1 day after the actual termination date of the most recent placement or the day after the last of any future-dated changes, whichever is later. For back-to-back hiring, there can be no future-dated changes.

## Rehire before Final Process Date

**US and Russian Payroll Only:** To provide greater flexibility in the hiring process, Oracle HRMS enables you to rehire a terminated employee before the Final Process (and after the Last Standard Process) date for their previous period of service.

### *Rehire before Final Process Date*



As illustrated in the diagram, when you complete the rehire, the application changes the existing, terminated assignment into a secondary assignment. The new, active assignment becomes the primary. You can then process payments from both assignments during the overlapping periods of service.

**Note:** When you cancel the rehire, the application changes the secondary terminated assignment into a primary terminated assignment.

When you rehire before the final process date, the employee has overlapping periods of service between the rehire date and the final process date. The Terminate window displays the service dates for all the overlapping periods of service. The latest period of service appears by default. You can scroll down to view the earlier periods of service.

## Valid Person Types for Applicants

You can convert an applicant to an employee but not to a contingent worker. However, an applicant can become a contingent worker (a Contingent Worker.Applicant) while their application for employment remains active. Subsequently, you can either cancel the application, and allow the contingent worker placement to continue, or end the contingent worker placement prior to hiring the applicant.

## Hiring an Applicant (People and RPA Windows)

You perform all hiring-related actions with an RPA, such as Appointment, Transfer, and Promotion personnel actions.

### To hire an applicant:

1. Update the applicant assignment status to Accepted in the Application window.

**Note:** You cannot appoint someone on the same day that you update that person's applicant record.

2. Use the Mass Update of Applicants window to update the assignment status of multiple applicants.

**Note:** Do not enter or update an employee's hire date in the Hire Date field. The application automatically enters the Hire Date field based on the effective date of the Appointment action.

3. Appoint the person with a Request for Personnel Action.

Upon update to HR, the application enters the information captured in the RPA and RPA extra information to the appropriate Person, Assignment, and Position windows and extra information types.

The application creates elements in the Element window. You can also enter other non-RPA compensation information in the Element window. The application assigns the employee the default payroll (biweekly), unless you specified another payroll when appointing that person in the US Federal Payroll Type RPA Extra Information.

## Rehiring an Ex-Employee

The ex-employee's and ex-contingent's records remain in the database. If you decide to rehire an ex-employee, you can process an Appointment or Conversion personnel action for that person.

You can hire the person to the same position or to a different one. For example, if you're transferring employees between agencies within the same business group, you can transfer the employees into the new positions with an effective date that begins the day after the transfer's effective date.

If you decide to rehire an ex-contingent worker as an employee, you make that person an applicant and process an Appointment action. If you decide to rehire an ex-contingent worker as a contingent worker, you create a placement for that person.

See: US Federal Contingent Workers, page 2-48

**To rehire an ex-employee:**

1. Process an Appointment action with an effective date that begins at least one day after the termination's effective date.

When the application updates the new Appointment action, the person's assignment record consists of two Appointments: the former end-dated assignment and the current assignment. (You can only view the current one.)

**Conversion of Ex-Employees and Element Entries**

When you process a Conversion action for an ex-employee, the number of calendar days between the effective date of the Separation and the Conversion must be equal to or less than three days.

When you convert an ex-employee, the application only updates those elements processed as part of the Conversion RPA.

If the employee had federal employee health benefits under the previous end-dated assignment, and the application had processed the Termination Life Event de-enrolling the ex-employee from FEHB, upon rehire, the initiates an Initial Opportunity to Enroll life event that permits the employee to choose a plan.

If you rehire the employee before processing the Termination of Life Event, the application detects this life event and creates a Change in Employment Status life event. Before the employee can make their new elections, you must process the previous Termination Life Event.

See: Terminating Employee Assignment, page 2-69

Use the Element Entries window.

**To reinstate elements:**

1. In the Element Entries window, add each element, entering the Start Date for the element that is equal to the Conversion's Effective Date.

**Note:** You must enter health benefits through an RPA, self-service, or the professional user interface.

# Recruitment Using People Management

## Recruitment Using People Management Templates

Oracle HRMS provides predefined templates such as Hire Applicants that support effective and easy applicant deployment. Using the Hire Applicants template you can complete the tasks from applicant entry to applicant hire.

The template enables you to:

- Enter personal and professional details of applicants
- Record application information
- Schedule interviews
- Track the applicant's progress and update the status of the application after each recruitment stage
- Terminate applications
- Make offers to applicants
- Hire successful applicants and record details such as new terms and conditions and payroll information for the new hire

You can work with your system administrator to modify the predefined template and create windows that best suit your recruitment process.

For details about using the predefined templates, see: *Predefined People Management Templates, Oracle HRMS Configuring, Reporting, and System Administration Guide*

For details about designing your own template, see: *People Management Templates, Oracle HRMS Configuring, Reporting, and System Administration Guide*

You can make future dated changes to a person's details using the Hiring Applicants template. However you cannot hire an applicant prior to the future dated changes. For example, if you change the applicant's details on February 10th, then you can hire the applicant only on or after February 11th (the date of the last change plus one day).

## Entering a New Applicant

You can enter a new applicant and then track that person up to the point of hire using the Hiring Applicants windows.

### **To enter a new applicant:**

1. Display the Summary window of the Hiring Applicants form.
2. Choose the New icon in the toolbar or right-click on People By Name in the Data Organizer and choose New from the right mouse menu.
3. Select New Applicant and choose OK.

The Personal tab is displayed for you to start entering information about the applicant.

4. Set your effective date to the date when you want the applicant assignment to begin, such as the closing date for applications. You can enter a date in the Date field next to the timeline bar and choose Go.

5. Enter personal information for the applicant.
6. Choose the Communication tab if you want to enter contact information, such as addresses and phone numbers.
7. Enter application information in the All Assignments, Compensation, and Schedule tabs, as required.

See: Entering Application Information, page 1-23.

8. Your localization team may have setup other tabs for you to complete.
9. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: *Multiple Person Records, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

## Recording an Application

You record applications for jobs using the Hiring Applicants window. Use this procedure for employees applying for internal vacancies, applicants applying for another vacancy, and external people who are currently neither employees nor applicants.

To enter an applicant who is not yet recorded on your system, see: Entering a New Applicant, page 1-21.

### To record an application:

1. In the Summary window, use the Data Organizer to select the person. Use the Find window if you need to search for the person.
2. Set your effective date to the start date for the new application.
3. Choose the Actions button.
4. Select one of the following and choose Next:
  - Apply for Internal Vacancy (if the person is an employee)
  - New Application (if the person is already an applicant)
  - Apply for Job (if the person is external - neither an employee nor applicant)
5. For employees and external people, select the correct person type and choose Next. For example, for an employee you might select Employee and Applicant.
6. Choose Finish.

A new default application is created for the person.

7. Select the new application in the Data Organizer and choose Show Details to view and edit this application.

**Note:** Remember to choose Correction when you are correcting information that was created by default.

For information about the fields on the Application, Compensation, and Schedule tabs, see: Entering Application Information, page 1-23.

## Entering Application Information

After entering a new applicant or recording a new application, you can edit the default application information entered by the system. You can use the Hiring Applicants windows.

### **To enter or update application information:**

1. In the Summary window, use the Data Organizer to select the application and choose Show Details.
2. If you are updating an application, set your effective date to the date the information should change.
3. Choose the All Assignments tab.
4. Enter the date the application was received.
5. Select an Application Status and the reason for giving this status.
6. If the application is for a specific vacancy, select the recruitment activity and vacancy. Assignment information from the vacancy is displayed. You can add more assignment details.
7. Optionally, you can enter information about the following:
  - The recruiter who is responsible for handling the application
  - The source of the application, such as the type of recruitment activity, or the source organization that recommended the applicant, or the employee who referred the application.
8. Choose the Compensation tab if you need to enter a payroll, salary basis, or proposed salary. The salary basis is the duration for which salary is quoted, such as per month or per year.
9. Choose the Schedule tab to enter information about normal working hours or probation period for the assignment.
10. Enter information in any other tabs that may have been created for your localization. For example, many localization teams will include an Extra Information tab to enable you to enter country-specific information.
11. Choose Correction or Update. Remember to choose Correction if you are correcting information that was created by default.
12. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

## Making an Offer to an Applicant

In the Hiring Applicants window, you can quickly make a job offer to an applicant.

### **To make an offer to an applicant:**

1. In the Summary window, use the Data Organizer to select the applicant. Use the Find window if you need to search for the person.
2. Set your effective date to the date of the offer.
3. Choose the Actions button.

4. Select Make an Offer and choose Next.
5. Select the assignment status and choose Finish.
6. Choose the Checklist tab and update the Send Offer checklist item to reflect that the offer has been made, if required.
7. Save your work.

## Changing an Applicant's Status to Accepted Offer

When an applicant has accepted a job offer, you can update the applicant's details in the Hiring Applicants window to show that they have accepted the offer of employment.

### To change the applicant's status to Accepted Offer:

1. In the Summary window, use the Data Organizer to select the person you want to update. Use the Find window if you need to search for the person.
2. Choose the Actions button.
3. Select Applicant Accepted and choose Next.
4. Choose Next to view a summary of what you have done or choose Finish to save your changes.

## Hiring an Applicant

Follow the procedure described below to enter a hiring date for an applicant, change the applicant's person type to Employee and hire them into a specified assignment. Use the Hiring Applicants window to do this.

### To hire an applicant:

1. In the Summary window, use the Data Organizer to select the person you want to hire. Use the Find window if you need to search for the person. If you want to hire the person into one specific application then select this.
2. Choose the Actions button.
3. Select one of the following actions and choose the Next button:
  - **Hire Applicant into all accepted assignments.** Select this action if you want to hire the applicant into all the applications that have been accepted, and to delete all other applications for this person.
  - **Hire Applicant into current assignment only.** Select this action if you only want to hire the person into the application you currently have selected, and to leave all other applications as they are.
4. If you have selected Hire Applicant into all accepted assignments, enter the hire date and choose Next.

A list of accepted applications is displayed.

5. If the applicant is already an employee, Oracle HRMS presents the question 'Do you want to update the primary assignment'. You can select one of the following options:
  - Yes. Make existing assignment secondary:



The application makes the new applicant assignment the employee primary assignment. The existing employee primary assignment becomes the secondary assignment.

- Yes. Merge with existing primary assignment:

The application copies information from the applicant assignment to the employee primary assignment, but does not copy empty fields. For example, if you have defined London as the location for the employee primary assignment but not entered a location in the applicant assignment, then London remains the location for the new employee assignment.

- Yes: Replace existing primary assignment:

The application overwrites all fields in the existing employee primary assignment with equivalent fields from the new applicant assignment, even if those fields are empty. For example, if Employee A is a supervisor for the existing employee assignment, but the applicant assignment includes no supervisor information, then the new employee assignment contains no supervisor information.

- No. Create new secondary assignment:

The application makes the applicant assignment the employee's secondary assignment. The application makes no change to the existing employee primary assignment.

6. Choose Next to view a summary of what you have done or choose Finish to save your changes.

## Ending an Application

You can end a person's applications using the Hiring Applicants window.

### To end an application:

1. In the Summary window, use the Data Organizer to select the person whose application you want to end. Use the Find window if you need to search for the person.
2. Set your effective date to the date for ending the application.
3. Expand the person's node and select the application.
4. Choose the Actions button.
5. Select End Application and choose Next.
6. If the applicant has more than one application, go to step 8, page 1-25. Otherwise, select a new person type, such as ex-applicant and choose Next.
7. If you want to record reasons for rejecting applicants, select a reason and choose Next.
8. Choose Finish.

## Reactivating an Application

You can reactivate an application that was previously ended Use the Hiring Applicants window.

**To reactivate an application:**

1. In the Summary window, use the Data Organizer to select the applicant. Use the Find window if you need to search for the person.
2. Set your effective date to the date when the application becomes active again.
3. Expand the person's node and select the application.
4. Choose the Actions button.
5. Select Apply for Job and choose Next.
6. Select the Applicant person type and choose Next.
7. Choose Finish.

The applicant's assignment status is Active Application. The Application Received field shows the effective date (the date from which the application was reactivated).

## Terminating an Applicant

You can end the progress of an applicant using the Hiring Applicants window.

**To terminate an applicant:**

1. In the Summary window, use the Data Organizer to select the applicant. Use the Find window if you need to search for the person.
2. Set your effective date to the date when you want to terminate the applicant.
3. Choose the Actions button.
4. Select Terminate Applicant and choose Next.
5. Select a new person type, such as ex-applicant and choose Next.
6. If you want to record reasons for rejecting applicants, select a reason and choose Next.
7. Choose Finish.

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# People Management

## People Management Overview

Oracle HRMS provides you with an efficient and flexible people management system to organize your workforce as your enterprise requires. Using Oracle HRMS you can:

- Maintain information on all current and potential workforce to track their roles and activities from the time they apply for a job to when they leave your enterprise.
- Record deployment information such as organization, job, position, and grade of the workers in your enterprise.
- Maintain details such as qualifications, competency profiles, work choices, and benefits eligibility data to manage workforce development.
- Maintain documents of record such as work visas, permits, and certificates.
- Handle mass change processes to implement changes to high volumes of information, such as employee job data, new departments, or new work relationships.

## Managing Workforce Details

You can manage your workforce details using the following features of Oracle HRMS:

- **Identify Workforce:** Enter, track, inquire, and report on people daily using the People window where you can enter information about your employees as well as the Request for Personnel Action window where you can process actions concerning these employees.

You can use the Person Summary window to display consolidated information about an employee. This window contains several tabbed regions where you can view related information about the employee, such as personal data, assignment and position details, pay and benefits, and performance ratings.

- **Person Types:** Record information related to different groups of people such as applicants, employees, and contingent workers and restrict access of the records of different groups of people.
- **Assignments:** To enable you to view the details about the different work an employee does for your agency and relate your employees to the overall work structure, Oracle HRMS provides you with employee assignments.
- **Workforce and Assignment Identification:** Use unique numbers to distinguish your workforce and their roles:

- **Person number:** Identifies every employee, contingent worker, or applicant in your business group..
- **Assignment number:** Identifies every assignment in your business group.
- **Assignment Statuses:** Record changes in the work status of an employee or contingent worker such as Active, Suspended, Terminated or Ended. To provide you with further flexibility, you can expand the statuses by defining different user statuses for each system status. For example, the product has predefined user statuses for Active, including Active Appointment, Detail NTE, and Temporary Appointment NTE.

## Recording Addition Information

In addition to the workforce information you enter, you can set up flexfields to capture information unique to your enterprise.

- **Special and Extra Information Types:** Define fields to hold information that is unique to your agency about jobs, positions, assignments, and people.
- **Extra Information Types:** Add fields that capture additional information that your business practices require.

To understand the difference between Special Information Types and Extra Information Types, see: Extra Information Types (EITs), *Configuring, Reporting, and System Administration Guide*.

## Workforce Management Using Oracle Self-Service Human Resources

Oracle Self-Service Human Resources (SSHR) enables line managers, employees, and contingent workers to update their personal and professional information through interfaces personalized to their roles, work content, and information needs. To work with Oracle SSHR, you must purchase the license from Oracle. For information on licenses, contact your Oracle sales representative.

See: Using SSHR for Workforce Sourcing and Deployment, *Oracle HRMS Deploy Self-Service Capability Guide*

## People Management

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

Using Oracle HRMS you can hold, inquire about, and track a wide range of personal information, such as contact information, employee addresses, work schedules, preferred language for correspondence.

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

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

**Can you enter information specific to your enterprise?**

Yes, you can. Not every agency holds the same information about its workforce, so you can configure Oracle HRMS using descriptive flexfields, Extra Information Types, and Special Information Types to record everything you need to know.

**Does Oracle HRMS provide any specific features for managing contingent workers?**

Yes, Oracle HRMS enables you to treat contingent workers as an entirely separate category of human resource that you can process and report on separately from employees.

# People

## People in a Global Enterprise

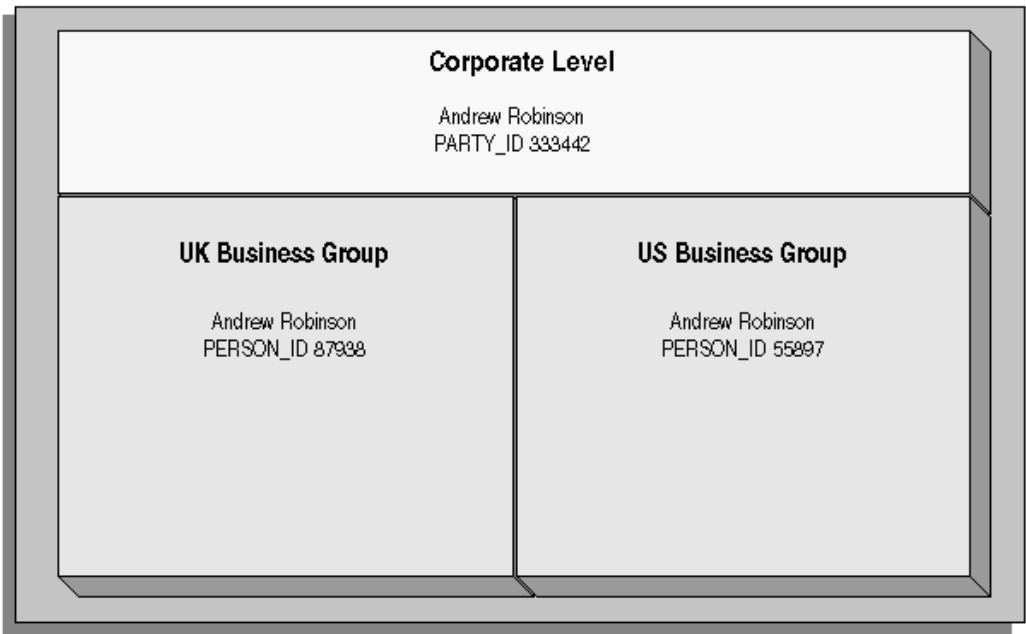
Based on a common core application for all countries, Oracle HRMS provides you with the ability to support both local and corporate requirements for global enterprises.

People who are employees, contingent workers, applicants, or contacts of other internal people are entered within a legislative or cultural context. In Oracle HRMS, this means they have a record in a business group that complies with the legislative requirements of a specific country.

From a corporate perspective, for your employees, contingent workers, and applicants you also need to view this information across business groups to enable you to set up reporting lines and relationships between people and organizations in different countries.

As part of your global enterprise, you may have international employees who transfer between business groups to work temporarily in other countries. It is likely in this instance that you will have several local records for that person in different business groups. You still however, need to be able to identify at a corporate level that these records all relate to the same person.

### *A Multi-Organization Person Record*



Oracle HRMS provides you with a corporate level record for each of your employees, contingent workers, and applicants. This record links all the local records for a person and is available in all business groups and also to other E-Business applications.

**Note:** People who are entered only as contacts of other internal people do not have a corporate level record. This enables you to restrict access to a contact's information to one business group.

To create this global view of a person, Oracle HRMS is integrated with Trading Community Architecture (TCA). TCA enables you to store person information at a corporate level so that it is available across all applications in your e-business suite. TCA provides a single place in which a person can be uniquely identified as a *party*. A sub-set of the personal information entered in HRMS is automatically held at the corporate level in TCA.

Some people, for example, customers, are only held at the corporate level as parties. They can be linked to other HR people as appropriate.

**Note:** You must have the HR: Cross Business Group profile option set to Yes for your responsibility to create links between people in different business groups.

To ensure the records in the corporate and local levels are synchronized it is important that lookup types that relate to global person information contain exactly the same lookup codes in TCA and HRMS. For example, if you add a new code to the TITLE lookup type, you must ensure the same code is added to the equivalent TCA lookup type. If the codes do not match identically then the field is cleared in TCA when an update is made in HRMS.

## Benefits of Linked Person Records

One of the benefits of having the person records linked is that if any of the following information is updated in one business group, then it will be visible, in read-only format, in all other business groups relating to the person.

- Qualifications
- Establishments attended
- Competencies

**Note:** Competencies may be defined as global or local to a business group. Only global competencies are visible from within another business group. Those that are local to one business group can only be seen within the context of that business group.

In addition to this, you can enable person synchronization. This enables you to update certain information against one record and have it automatically applied to all other records relating to the person. This ensures that you have a common set of information for one person across all countries in which that person operates.

**Note:** To control the synchronization of your person records you use the HR: Propagate Changes profile option.

See: Person Record Synchronization, page 2-12

## Validating People in Multiple Business Groups

When you create a new person record in any business group in Oracle HRMS, the application looks for matching records in all business groups and lists the records of potential duplicates. If you indicate that one of these records relates to the same person as your new record, the application automatically adds the global person reference to the new record.

When determining whether to store information at the corporate or legislative level, Oracle HRMS applies the following rules:

- Employees, applicants, and contingent workers have both corporate and legislative records.
- Ex-employees, ex-applicants, and ex-contingent workers retain both corporate and legislative records.
- People whose system person type is Other have a legislative record only.

**Note:** HRMS considers any person with a system person type of Other to be a contact; contacts do not have to be part of an active contact relationship in Oracle HRMS.

- Employees, applicants, contingent workers, ex-employees, ex-applicants, and ex-contingent workers who are also contacts have both corporate and legislative records.

When a contact becomes an employee, contingent worker, or applicant, the application creates a corporate-level record if one does not already exist.

**Note:** In this case, if you subsequently cancel (rather than terminate) the contact's employment, application, or placement, the application deletes the corporate-level record.

HRMS makes all changes to corporate-level and legislative-level records that are required as a result of person-type changes at the time the change is entered, rather than when the change comes into force.

## Person Numbering

In Oracle HRMS, every employee, applicant, and contingent worker has a person number. If you select global person numbering, Oracle HRMS allocates numbers from a single sequence to workers of the relevant person type throughout the enterprise.

A person who moves from one business group to another does not retain the person number from the original business group, even when global person numbering is in effect. Note, however, that you can write a formula to generate a global custom number sequence for a person type. You can handle other business needs, including the need to retain person numbers between business groups, in a person number formula.

## Person Names

Oracle HRMS defines some standard formats for person names, which you can edit. You can also define your own person-name formats. For example, you can define formats for use in custom code or legislation-specific versions of the standard formats if your localization does not supply them. Person-name formats can be local or global:

- Local formats are suitable for users in a single legislation who view person names in a character set appropriate to their legislation.
- Global formats are generally suitable for users in global enterprises who prefer to view person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.



See: Person-Name Formats, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

## Tracking People's Roles and Activities

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

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

See: What Is Oracle Self-Service Human Resources (SSHR), *Oracle HRMS Deploy Self-Service Capability Guide*

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

### ***Tracking peoples roles and activities table:***

Window	Purpose	See
Application	Describes the vacancy for which an applicant has applied	Applications and Assignments, page 1-7
Book Events	Records that an employee or applicant will attend an event. The event must already be defined in the Event Bookings window. If you use Oracle Learning Management, see: Introduction to Oracle Learning Management, <i>Using Oracle Learning Management</i>	Event and Attendance Administration, page 5-105
Employee Review	Schedules and records details of an employee's review or other interview type	Employee Reviews, page 5-106
Applicant Interview	Schedules and records details of an applicant's interviews	Interviews and Other Recruitment Events, page 1-10
Assignment	Records details of an employee's assignment	The Employee Assignment, <i>Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide</i>
Contract	Records details of an employee's contract	Entering Contracts, page 2-31
Supplementary Roles	Records details of supplementary roles a person can perform in addition to being an employee	Entering Supplementary Role Information, <i>Oracle HRMS Enterprise and Workforce Management Guide</i>

## Windows for Maintaining Personal Information

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

- Applicants
- Further names
- Address details
- Telephone numbers
- Picture record
- Dependents, beneficiaries and other contacts
- Contracts
- Supplementary role
- Office location
- Previous Employment
- Documents of Record
- Allocated Checklists

**Note:** The system administrator can create customized versions of the People window by person type or function, and then through responsibilities, profiles, and menu structures determine which records the user can access.

## Displaying Personal Information

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

- Use Employee Direct Access to view and update your own personal details using a web browser.
- Use Line Manager Direct Access to view information about people in your organization.
- Use the Person Summary window to view information about your employees.
- Use an inquiry window to view specific information about a person, such as employment or absence history.

See: *Using Inquiry Windows and Folders, Oracle HRMS Configuring, Reporting, and System Administration Guide*

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

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

## Identifying Employees, Contingent Workers, and Assignments

Oracle HRMS uses the following unique identifiers for employees and contingent workers:

- Employee number
- Contingent worker number
- Assignment number

You can search for employees and contingent workers by employee number and contingent worker number in the Find window.

See Finding a Person Using the Find Person Window, page 2-16 or Finding a Person or Group of People, page 2-85

You can also search for an employee using the Person Search function in SSHR. You can search for employees by employee number and assignment number.

See Person Search, *Oracle HRMS Deploy Self-Service Capability Guide*

### Employee Number

The employee number uniquely identifies every employee in your business group.

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

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

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

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

### Contingent Worker Number

Like employees, contingent workers can have only one identifying number and you decide how this number is generated when you define your business group. Also, if you choose automatic or national identifier number generation, the contingent worker number remains the same for multiple periods of placement in the same way as it does for employees. If you choose manual number entry, you can update the number at any time.

As well as being able to choose automatic, manual, and national identifier number generation, you can also choose to identify your contingent workers using the same batch of numbers as your employees. You can do this by selecting the *use employee numbering* option when you define your business group. Using this method of number generation enables you to have your employee numbers and contingent worker numbers in the same sequence. For example, you enter an employee and they are given the employee number 101. If the next person entered is a contingent worker they are given the number 102 by the application.

## Changing the Number Generation Method

To change from automatic to manual person numbering, you edit the business group information. In the Business Group Info window, select Manual for the relevant person type.

To change from manual to automatic numbering, you run the process "Change Person Numbering to Automatic" for the relevant person type.

## Global Person Numbering

By default, automatic person numbering is local: it operates within the business group, and Oracle HRMS starts a new sequence for each business group. Alternatively, you can select global person numbering, where a single person number sequence applies to all business groups.

To select global person numbering, you run the process "Change automatic person number generation to global sequencing" for the person type. This process sets the appropriate user profile option (HR: Use Global Applicant Numbering, HR: Use Global Contingent Worker Numbering, or HR: Use Global Employee Numbering) to Yes. This option applies to the specified person type in all business groups. Note that you implement global person numbering by person type: for example, you could select global person numbering for applicants only or for applicants and employees.

You cannot switch from a global person number sequence to a local person number sequence. You can, however, switch from global person numbering (which is automatic) to manual person numbering by editing the business group information.

You can replace the default local or global number sequence for employees, contingent workers, or applicants using a global custom number generation formula. You may want to use an alphanumeric scheme, for example, or handle related requirements, such as the need to retain person numbers between business groups.

See Writing Formulas for Person Number Generation, *Oracle HRMS FastFormula User Guide*

## The Assignment Number

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

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

If an employee or contingent worker has a second current assignment, the application also generates the second assignment number by default from the employee or contingent worker number, as in the following example:

Employee Name: Samantha Green

Employee Number 1012

1st Assignment Number 1012

2nd Assignment Number 1012-02

## Person Extra Information Types

You can define as many Extra Information Types (EITs) as you require to hold information about people. The product also comes with predefined person EITs.

**Note:** To be able to access the predefined EITs, you must link the EIT to your responsibility.

See: *Setting Up Extra Information Types Against a Responsibility, Configuring, Reporting, and System Administration Guide*

The predefined US Federal person EITs include:

- US Federal Conversions - records information captured on a Conversion to Appointment RPA actions, such as the date the conversion career begins and the date on which it was recommended to begin.
- US Federal Ethnicity and Race- stores one or more ethnic and racial category for an employee
- US Federal IPA Benefits Continuation - stores EHRI data, such as Federal Employee Life Insurance, Federal Employee Health Benefit, retirement election, and Continuation Termination Insufficient Pay data
- US Federal Mass Actions - stores information as part of the employee's record that results from a Mass Salary or Mass Transfer action.
- US Federal Person Benefits - captures Federal Employee Health Benefits, Federal Employee Retirement System, Thrift Savings Plans, and Federal Employee Group Life Insurance dates such as eligibility and expiration dates.
- US Federal Person Group 1 - stores information about the employee entered before processing an RPA, such as citizenship code, as well as those values entered in the RPA extra information when the action is updated to the HR database, such as promotion date, or a change to the person's FEHB benefits.
- US Federal Person Group 2 - records obligated position information, the expiration dates such as for overseas tour and return rights, duty station contingency location, and draw-down action ID.
- US Federal Person Leave Information - captures annual leave, sick leave, and leave earnings status information.
- US Federal Person RPA - stores citizenship and veteran's preference and status.
- US Federal Probations - captures information about probations, such as the trial period dates and when probation ends.
- US Federal Retained Grade - stores information for each retained grade record that the employee has been placed on, such as the grade, step, pay table ID, and pay basis.
- US Federal SCD Information - stores relevant information about the Service Computation date, such as the date used as the basis for the employee's leave, Reduction in Force, and Thrift Savings Plan.
- US Federal Security - captures information resulting from a federal security check, such as the basis and type of investigation, the date the investigation was completed, and the clearance.

- US Federal Separation and Retirement - stores information about the user's separation or retirement package such as the FERS coverage, NAF retirement indicator, and projected retirement date.
- US Federal Service Obligation - stores service obligation type and start and end dates
- US Federal Uniformed Services - captures information about the user's military status, such as the retirement date and retirement grade and reserve category.
- US Federal User Information - specifies which restricted RPA the user accesses.
- US Federal Workflow Routing Groups - associates the user to a routing group and sets the default roles for that user's routing group membership.

Other global predefined EITs that you can use include:

- Alien Income Forecast - the type of income a visa holder receives, as well as the amount and the year in which the income was received.
- Global Work Permit - information about the work permit an employee holds.
- Passport Details - information about the visa holder's passport, such as country of issue, passport number, issue date and expiry date.
- Visa Details - information about the visa an employee holds, such as visa type, visa number, issue date and expiry date.
- Visa Payroll Details - information about the amount of income and benefit a visa holder receives.
- Visa Residency Details - information about a visa holder's residency, such as residency status, the residency status date, the first entry date and tax residence country.
- Visa Visit History - records a visa holder's visits to a country. The EIT stores information such as the purpose of the visit, the start and end dates of the visit, and whether the visa holder was accompanied by a spouse or children.

## Person Record Synchronization

If you have local records for the same person in different country business groups, then you can set up Oracle HRMS to synchronize those fields that are considered to be global for that person. For example, if a person notifies a change of name in one country, the application automatically changes the names in all other countries and on the global or corporate record. The fields included in this synchronization are:

- Full Name
- Last Name
- Date of Birth
- First Name
- Known As
- Marital Status
- Middle Names
- Nationality
- Gender

- Title
- Blood Type
- Correspondence Language
- Honors
- Pre Name Adjunct
- Rehire Authorizer
- Rehire Recommendation
- Resume Exists
- Resume Last Updated
- Second Passport Exists
- Student Status
- Suffix
- Date of Death
- Uses Tobacco Flag
- Town of Birth
- Country of Birth
- Fast Path Employee
- Email Address
- FTE Capacity

To control the synchronization of your person records you use the HR: Propagate Data Changes profile option.

If you want changes to your person records to be propagated throughout all business groups, then set this profile option to Yes at the site level. The default setting is No.

Providing the profile option is set to yes, then any changes you make are propagated automatically throughout all the records for that person when you save the record you are updating.

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

## New Record Synchronization

When you are entering a new person record for a person who already exists in another business group, the new record is considered to be the most up to date record for a person. Therefore, if you have synchronization enabled, then the application copies the global personal information entered in the new record to all existing records.

Fields that are blank in the new record are not copied to any other business groups. If an existing record for the person in another business group has a value for one of the fields left blank in the new record, then the existing value is added to the new record once you save.

For example, suppose you have an existing person record for John Brown in the US business group with the following values in the table below:

**Person Record Table**

Field	US Business Group
First Name	John
Middle Name	Robert
Last Name	Brown
Date of Birth	01-MAR-1972
Marital Status	Married
Blood Type	A
Uses Tobacco?	

Then, you create a new record for John Brown in the UK business group with the following values:

Field	UK Business Group
First Name	John
Middle Name	
Last Name	Brown
Date of Birth	01-MAR-1972
Marital Status	Divorced
Blood Type	A
Uses Tobacco?	Y

If you link this new record to the existing one in the US business group, then you will end up with the following values:

Field	US Business Group	UK Business Group
First Name	John	John
Middle Name	Robert	Robert
Last Name	Brown	Brown
Date of Birth	01-MAR-1972	01-MAR-1972
Marital Status	Divorced	Divorced
Blood Type	A	A
Uses Tobacco?	Y	Y

## Restrictions of Synchronization

The process of synchronizing data across business groups is dependent on the following factors:



## Legislative Lookups

The application only propagates personal information across business groups for values selected from lookups if the lookup code exists in the target business group. For example, supposing a marital status is changed within a German business group for a person that also exists in a UK business group. If the value chosen in the German business group is not applicable to the UK, then the UK marital status is not changed.

## Character Sets

The application only copies personal information across business groups if the character sets for the business groups are compatible. If an entry in one character set can not be converted to the character set of the destination business group, then the information is not updated. For example, an update to a person's name in Japanese cannot be copied to an English representation of that name.

## Future Dated Changes

If there are future dated changes to the personal details for the record to which you are copying information, then these are all overwritten when the application propagates changes. For example, suppose we have the following scenario:

- A record for John Smith was created on 1st January 2001. At creation he was given the marital status of Single.
- During the creation of the record, a future dated change is made to the record to change his marital status to Married on 1st March 2001. So the marital status record looks like:
  - 01/JAN/2001-28/FEB/2001: Single
  - 01/MAR/2001-End of Time: Married
- On 1st February 2001, a new record for John Smith is created in a different business group and is linked to the first record. In the new record a marital status of Divorced is selected. If synchronization is enabled, then the marital status of the original record will be changed to Divorced from 1st February and also the future dated change will be overwritten with the status of Divorced. So after the synchronization the original record is:
  - 01/JAN/2001-31/JAN/2001: Single
  - 01/FEB/2001-28/FEB/2001: Divorced
  - 01/MAR/2001-End of Time: Divorced

## Maintaining Synchronization

To check that all of your person records have been updated as you expect, you should run the Person Synchronization report.

The report shows details of any person in your current business group who also has a record in another business group, on the date specified. Any piece of information that is different between the two business groups is indicated with an asterisk in the Different column of the report.

**Note:** Synchronizing values across business groups has implications from a legislative and legal perspective. It can also impact your benefits eligibility and enrollments set up. If you prefer not to enable automatic

synchronization, use the Person Synchronization report to identify differences between records and update records manually.

## Special Information Types

You use the *Personal Analysis key flexfield* to define any special information not provided by the main system that you want to hold about people, jobs and positions, and training activities.

During implementation, the application pre-configures the Personal Analysis key flexfield to store government-related information and associates it to the People window. These flexfields store information for:

- Education
- Conditions of employment
- Conduct performance
- Language proficiencies
- Performance appraisal
- Special consideration.

**Note:** The application uses these Special Information Types. You may extend them and create new ones, but do not delete the seeded ones.

See: Running the Federal Special Information Types Process, page 2-28, Enabling Special Information Types, page 2-28

The application associates this information to the People window.

When you enable Special Information Types for your Business Group, you select how you plan to use each type. You can use Special Information Types for job and position requirements, personal information, and skills provided by training activities.

You can use each Special Information Type for one or more of these purposes. The options you select control the windows in which each Special Information Type appears.

## Finding a Person Using the Find Person Window

When you navigate to the People window or any of the FastPath function windows, the Find Person window automatically displays in front of it.

### To query a person using the Find Person window:

1. Do one or a combination of the following:
  - Enter a full or partial query on the person's name. Where a prefix has been defined for the person, a full name query should be in the format 'Maddox, Miss Julie'.
  - Enter a full or partial query on the person's national identifier (such as social security number).
  - In the Search by number region, select a number type of employee, applicant, or contingent worker to enter your query on. Then enter a full or partial query on the number type selected.

2. Choose the Find button.

**Note:** If you choose Find without entering any search criteria, the People window is displayed with the first record shown. You can use the [Down Arrow] key or choose Next Record from the Go menu to display the next person

If only one person is found, they immediately display in the People window or the appropriate FastPath function window. If more than one person is found, the results display in a separate window.

3. Choose the person from the list and choose OK to display their details in the People window or the appropriate FastPath function window.

## Entering a New Person

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

- Applicant information
- Employee information that does not require a Request for Personnel Action (RPA) form
- Information about external people such as contractors or volunteers, or about contingent workers

**Note:** If you are entering information for a contingent worker, you can also use the Entering Contingent Workers template.

The minimum information to enter for all categories of people is name and action type. In addition, for employees you must enter gender, employee number, if your enterprise uses manual number entry and date of birth (for assignment to a payroll).

Your localization may require additional mandatory information for a person. See: Entering Additional Personal Information, page 2-20

### To enter a new applicant:

1. If the Find Person window opens, choose New.
2. Set your effective date to the appropriate date for adding the person to the system. If you are entering an applicant, this should be the date the application was received.

**Note:** By setting the effective date, you also ensure that Special Information and Extra Information required to process an Appointment action is in the database when you process the action.

3. Enter the person's name and other details in the Name region.

Only the last name is required.

- Use the Last Name field to enter all the parts of a person's last name that you want to appear in the Last Name field of an RPA. You can include names separated by a space or an apostrophe, such as de Rosa or D'Angelo.
- If an applicant's last name includes a prefix and suffix, enter this information in the Last Name field.

The RPA and NPA display the person's last name in the appropriate sequence: prefix, last name, and suffix. The last name and suffix are separated by a comma; for example, Van Wood Jr.

**Note:** When you enter the person's suffix in the first name field, make sure you include a comma and a space before the suffix.

- Last names are listed alphabetically and by case. For example, the last name 'Young' precedes the last name 'de Rosa.'
  - You use the Title field to enter a title such as Mrs. or Doctor for the person.
4. Select the gender, Male, Female or Unknown Gender, from the list.
  5. Select an action type, for example Create Applicant, in the Action field and select a person type from the list of values. The person type you select displays immediately in the Person Type for Action field before you save it. If only one user person type exists for the action type, a list of values is not displayed and the user person type displays automatically in the Person Type for Action field.

**Note:** When you appoint someone with an RPA, the system changes the person type Applicant to Employee.Ex-Applicant. If you terminate that person with an RPA, the person type changes to Ex-Employee.Ex-Applicant.

**Note:** If you enter a person as a contingent worker who has a previous person type, you can choose to revert the contingent worker back to the previous person type by using the Cancel Placement action.

You create user person types in the Person Types window. If you want to change a person type to another person type with the same system person type you must use the Person Type Usage window.

See: Changing Person Type Usage and Deleting OAB Person Type Usage, *Enterprise and Workforce Management Guide*

You must now save the action type you selected before you can view it in the Person Types field.

6. Do not enter or update an employee's hire date in the Latest Hire Date or Date First Hired fields.

**Caution:** When you update an Appointment RPA, the application automatically enters the Hire Date fields based on the appointment's effective date. If you change an employee's hire date using the Hire Date fields you risk corrupting that employee's record.

### Entering Identification Information

7. If your agency uses a manual number generation scheme, enter an employee, applicant or contingent worker number. If your enterprise uses automatic number generation (including Use Employee Numbering for contingent workers) the employee, applicant or contingent worker number automatically displays when you save your entries in this window.

**Note:** If you query a person who has a combination of employee, applicant and contingent worker numbers the employee number is displayed in the Number field. If the person does not have an employee number but has a contingent worker number and an applicant number the contingent worker number is displayed. However, you can choose to view any of the identification numbers held for a person by selecting them from the list.

8. Enter the person's social security number in the Identification region.

If your organization uses manual number entry, enter an employee or applicant number. If your organization uses automatic number generation, the employee or applicant number automatically displays when you save your entries in this window.

### **Entering Personal Details**

Enter details for the person as required in the Personal tabbed region:

9. If the person is an Applicant and you are going to appoint that person to a position, you must enter his or her date of birth.
10. Enter additional birth information into the Town of Birth, Region of Birth and Country of Birth fields.
11. If the Work Telephone field is displayed, enter the person's work telephone number. Otherwise, use the Phone Numbers window to enter this information.
12. In the Status field, select the person's marital status.

### **Multiple Person Records**

13. If your data already includes a person with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values shows all the people who share the details.

**Note:** People who are only entered with a person type of Other, that is someone external to your enterprise, are not shown in this list.

If you have entered neither a first name nor a date of birth, then the list of values displays all the records that match the information you have entered.

**Note:** The list of values displays only if your system administrator has set the HR: Cross Business Group profile option to Yes.

Do one of the following four tasks:

- If the person you are entering already exists, but in a different business group, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. If your application has person synchronization enabled, then the personal information entered for the new person is copied across to existing records in other business groups. If existing records have values for fields that the new record leaves blank, then these values appear in the new record. See: Person Record Synchronization, page 2-12
- If the person already exists in your current business group then select that person from the list of values. The application retrieves the existing record and cancels the save you were trying to make, as one business group cannot

contain two records for the same person. Close the new record and scroll down to display the existing record.

**Note:** You cannot link to any entry in the list of values marked with an asterisk as these either belong to your business group, or are linked to a person in your business group.

- If the person already exists in TCA, but not in HRMS, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. The information held for the person in TCA is updated with that entered in HRMS. See: People in a Global Enterprise, page 2-4
  - If the person you are entering does not match any of the records displayed, then select No Match in the lookup. Your new person record is saved.
14. For employees and applicants, choose the Employment tabbed region. Your Oracle localization team may have created extra fields in the protected descriptive flexfield in this region.
  15. For employees and applicants, choose the Address tabbed region and enter a primary address. (All employees must have a primary address.)

**Note:** The start date of the employee's primary address should be the same as or earlier than the new hire date. This preserves the integrity of the employee's records.

See: Entering People's Addresses at Sites without Oracle Payroll, page 2-74, Entering People's Addresses at Sites with Oracle Payroll, page 2-75

16. Enter Special Information details as required.  
Click Special Information, select the Special Information type from the list, click the Details field and complete the requested fields.
17. Enter Extra Information details as required.  
The application defaults person Extra Information to minimize data entry, such as the citizenship code, handicap code, veterans information, and so on. To enter additional information, choose the Others button, select the Extra Information type from the list, click the Details field and complete the requested fields.
18. Save your work.

### **What's Next?:**

Optionally, you can enter additional information for people in the tabbed regions. See: Entering Additional Personal Information, page 2-20

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

## **Entering Additional Personal Information (People Window)**

You enter additional information for applicants, employees, and external persons in the Extra Information and Special Information flexfields, and in the tabbed regions. After

you appoint someone to a position, the application restricts data entry in those fields that you can complete only with an RPA.

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

You can enter additional information for people in the tabbed regions described in the following steps.

**To enter employment information:**

1. Choose the Employment tabbed region.

See: New Hire Reporting, page 2-95

2. Check the Opted for Medicare check box if the employee has chosen medicare.
3. Select the status of the Employment Eligibility Form I-9. Under the US Immigration and Control Act of 1986, this must occur within three days of hire, or within 90 days for employees who have applied for the necessary documentation and are awaiting its receipt.

**Note:** By signing Form I-9, employees attest they are eligible for employment in the US. The employer also must sign the form, listing documents presented to verify the employee's eligibility as a US citizen, a lawful permanent resident alien, or an alien otherwise authorized to work in the US.

4. Enter an I-9 Expiration Date if the employee's eligibility to work in the US ends at a certain date, given in his or her documents.
5. To enter data for the New Hire report:
  - The New Hire Status field defaults to Include in New Hire Report, so that the next run of the New Hire report for the employee's GRE will include this employee.
  - If the New Hire report should not cover this employee, select Exclude from New Hire Reporting. Optionally, select a reason for this exclusion in the Exception Reason field.

You can enter exception reasons in the lookup type: US\_NEW\_HIRE\_EXCEPTIONS.

See: Adding Lookup Types and Values, *Configuring, Reporting, and System Administration Guide*

- If this employee is currently obliged to pay child support, check the Child Support Obligation box.

**Note:** After a run of the New Hire report that includes the employee, the entry in the New Hire Status field automatically changes to Already Reported.

See: New Hire Reporting, page 2-95

**To enter office information for a new hire, an existing employee, or contingent worker:**

1. Choose the Office Details tabbed region.
2. Enter the office number for this office.
3. Enter the internal location of this office.
4. Enter the office identifier for internal mail.
5. Enter the person's email address.
6. In the Mail To field, select Home or Office to indicate the person's preferred mail destination.

**To enter information for an applicant:**

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

**To enter further name information:**

1. Choose the Further Name Information tabbed region.
2. Enter one or more honors/degrees (BA, MBA, or JD, for example) which the person has earned.
3. Enter the name (perhaps a nickname) by which the person prefers to be known.
4. If the person previously was known by a different last name, enter the previous last name.

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

1. Choose the Other Information tabbed region.
2. Select the type of schedule in the Availability/Schedule field; for example, the days of the week the person works.
3. Enter the person's current full time/part time availability to work with your company.
4. Enter the person's current full time/part time availability to work with your agency.
5. Select the language the person prefers for correspondence. For example, select German if the person prefers to correspond or receive company information such as terms of pension plan in German.

**Note:** The Correspondence Language list includes languages in the FND\_LANGUAGES table. This table contains the languages that Oracle National Language Support Runtime Library (Oracle NLSRTL) supports. Check with your System Administrator for information on NLSRTL supported languages.

6. If the person has died, enter the date of death.



If you enter the termination reason of deceased and the actual termination date on the Terminate window and date of death has not been entered, it is set to the person's termination date.

7. Select the current status of the student, if the person is a student.
8. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.
9. Check the Second Passport Exists check box if the person possesses multiple passports.

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

1. Choose the Rehire tabbed region.
2. Check whether the former manager has recommended the applicant for rehire.
3. Select the reason for this recommendation.
4. Select the date the background check was performed.

**To enter medical information for a person:**

1. Choose the Medical tabbed region.
2. Select the person's blood type.
3. Select the date of this person's last medical test.

**To enter information concerning the background check for person:**

1. Choose the Background tabbed region.
2. Check whether the person background check has been performed.
3. Select the date the background check was performed.
4. Enter the name of the physician who performed this test.

**To enter benefits information:**

1. Choose the Benefits tabbed region.

**Note:** If necessary, you can add the Benefits Tab to the People window. Query the BEN\_MANAGER menu in the Menus window and add the HR View Benefits function to the menu.

2. Enter a benefit group for your employee or applicant. Benefit groups are used to determine a person's eligibility for a plan or for setting benefit rates. For example, benefit groups can be used for mergers and acquisitions where eligibility is complicated, or assist in grandfathering a person into an old plan
3. Enter what kind of tobacco your employee uses, if any. For example, cigarettes, pipe, cigar or chewing. This is used within benefits to determine the eligibility and rates for particular plans.
4. Enter medical plan number. This is the policy or group plan number of an externally provided medical plan. This is used to determine eligibility to participate in some plans.

5. Enter the adoption date, if the person has adopted a child. This information, with the date of birth, is used to determine whether a dependant is covered by a plan. You can only enter the adoption date if you have entered a date of birth for the person. The adoption date must be greater or equal to the date of birth.
6. Enter an adjusted service date for your employee. This date is used within benefits, in place of the date first hired, to determine the length of service for eligibility, enrollment and rates. The adjusted service date may be used to credit service for former employers, grand-fathered benefits or in the case of mergers and acquisitions.
7. Change the date first hired for your employee. For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.
8. Check the Other Coverage check box, if your employee or applicant has externally provided coverage. This determines a person eligibility for certain plans.
9. Check the Voluntary Service check box, if your employee or applicant is volunteering, for example as a missionary. This determines eligibility to continue or receive coverage from certain plans.

## Entering Pictures

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

- BMP
- CALS
- GIF
- JFIF
- JPEG
- PICT
- RAS
- TIFF
- TPIC

The default file format is TIFF so loading images using this format will give you the best performance.

You enter pictures in Oracle HRMS in the Picture window or the Picture tab of a template window.

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

1. In the Picture window or Picture tab, choose the Load Picture button.
2. Enter the file path to locate the directory in which you saved the graphic file.

3. Highlight the filename and choose the OK button. The graphic is loaded in the format indicated by the filename. For example, a file called image.bmp would be loaded as a BMP file.

## Entering and Maintaining Documents of Record

You can create documents of record, such as work permits, visas, travel documents, and medical certificates, and store them in Oracle HRMS.

You can view, update, and delete stored documents as required.

As an HR Professional, you can search for existing documents using the Search Documents of Record function. Alternatively, you can create and maintain documents for your direct reports or for individuals whose records you can access using the Documents of Record window. The Documents of Record window is available from the People window, from the FastPath menu, and from the Search Documents of Record page.

**Note:** The Documents of Record functionality is also available from SSHR.

See: Documents of Record, *Oracle HRMS Deploy Self-Service Capability Guide*

### To search for documents of record:

1. Select Search Documents of Record from the Navigator.
2. Enter your search criteria.

**Note:** You must enter either a document type, category, or subcategory.

3. Click Go to perform the search.

From the search results, you can view, update, and delete documents of record.

### To create or maintain documents of record for an individual:

1. Either display the person record in the People window and select Documents of Record from the list of navigation options, or select Documents of Record from the FastPath menu and search for a person.

See: Finding a Person Using the Find Person Window, page 2-16

The Documents of Record window appears showing any existing documents for the individual. You can create new documents of record and view, maintain, and delete existing documents.

2. To perform an action on an existing document, select the corresponding icon (Update or Delete).

**Note:** To view the document in read-only format, click the link in the Type column.

The Update Document of Record page or the Deletion warning page appears.

3. Alternatively, to create a new document, click Create Document of Record.

The Create Document of Record page appears.

See: Documents of Record, *Oracle HRMS Deploy Self-Service Capability Guide*

4. Complete the Create Document of Record page or update the document information, and click Apply.
5. Close the window.

## Running the Person Synchronization Report

The Person Synchronization report shows details of any person in your current business group who also has a record in another business group on the date specified.

Run the Person Synchronization report in the Submit Requests window.

### To run the Person Synchronization report:

1. Select the Person Synchronization report in the name field.
2. Click in the Parameters field to display the Parameters window, if it does not automatically open.
3. Enter the date upon which you want to run the report. The default is the current system date.
4. Select a person for whom to run the report or leave blank to run for all people in your business groups who are also in another business group.
5. Choose OK to run the report. You can view the results from the Requests window.

## Summarizing Personnel Data

The Person Summary consolidates information about an employee or contingent worker that you frequently view. For example, before processing a promotion action you might want to see a summary of the employee's performance ratings.

The Person Summary displays data that you enter manually in windows such as the Person and Special Information windows. It also displays data that the application enters automatically when it updates a personnel action to the HR database. The window contains several tabbed regions where you can view (not change) information, such as:

- Personal data
- Assignment and position details
- Pay, benefits, and awards
- Performance ratings
- Personnel actions that have been updated to the database

You can also view similar summaries using self-service. Employees can view their personal data, benefits, and employment-related data from the My Information menu. With the exception of benefits information, managers can view this information from the My Employee menu.

See: Information Overview, *Oracle HRMS Deploy Self-Service Capability Guide*

Use the Person Summary window

**To view personnel data:**

1. Set the effective date to view a summary of the personnel data as of that date.

**Note:** For elements, the effective date is the date of the RPA action that last updated the element. If the element contains a segment that you manually updated, the effective date is the date of the last manual update.

2. Tab to the information that you want to view.

## Deleting a Person from the System

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

You can use the People window to delete applicant or external records, such as those for volunteers or contractors.

If there is a contact for the person you are deleting, the system automatically deletes a contact if:

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

If the contact is used by another person or has other information such as applicant information, the contact is not deleted. However, Oracle HRMS removes all records of that contact and any relationships.

**To delete all records of a person:**

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

**Deleting incorrect records**

If you incorrectly enter an *applicant* into the system, you can change the information contained in the People window, or delete the record in the People window.

If you incorrectly enter an *employee* into the system, for example by processing an Appointment action, you must process a Cancellation personnel action, and then delete the employee record in the People window.

## Setting Up Special Information

**To set up Special Information Types:**

1. Define each Special Information Type as an instance of the Personal Analysis key flexfield.
2. Enable the Special Information Types you want to use in your Business Group and select how you want to use them.

See: Enabling Special Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

### **Oracle HR Only**

The remaining steps do not apply if you are implementing Oracle Training Administration, or Oracle Payroll, without Oracle Human Resources.

1. Consider whether you want to create configured versions of the windows in which you can enter and display Special Information. These are the Special Information window and the List People by Special Information window.  
  
See: *Windows You Can Configure, Oracle HRMS Configuring, Reporting, and System Administration Guide*
2. Design the task flows for entering personal information, which should include the Special Information window.  
  
See: *Task Flow, Oracle HRMS Configuring, Reporting, and System Administration Guide*
3. Design your navigation menus, including the List People by Special Information window (or your configured versions of it) and the personal information task flows.  
  
See: *Menu Structure, Oracle HRMS Configuring, Reporting, and System Administration Guide*
4. Consider your special information reporting requirements. A standard Skills Matching report is supplied. This compares the special information, such as skills, held by employees and applicants with the requirements of a job or position.

See: Skills Matching Report, page 5-104

## **Running the Federal Special Information Types Process**

Create Federal Special Info Types is a Concurrent Manager process that supplies the Federal Person Special Information. The system administrator runs this process during implementation.

Use the Submit Request window.

### **To run the Special Information Types process:**

1. Select Create Federal Special Info Types from the Name field
2. Position your cursor in the Parameters field. In the Parameters window, select the Business Group ID from the list of values.
3. Choose the Submit button.

## **Enabling Special Information Types**

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

### **To enable Special Information Types:**

1. Select the Special Information Types you want to use in your Business Group.
2. Enable each Type by checking the Enabled check box.

3. Check the other boxes to specify how you plan to use the Special Information Type. This makes it available in the list of values in other windows as follows:
  - Job: in the Job Requirements window
  - Position: in the Position Requirements window
  - Other: in the Special Information window
  - Skill: in the Skill Provisions and Search for Event windows in Oracle Training Administration

## Entering Special Information

Basic personnel information is handled in a fairly standard way from organization to organization. However, other types of information are recorded and used in quite different ways.

You set up each area of information that you want to handle separately as a *Special Information Type*. The product includes Special Information Types that store commonly recorded information about employees, such as performance and education data.

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

You enter information for the person in the Special Information window.

### To enter special information for a person:

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

# Contracts

## Contracts

Using Oracle HRMS you can record contractual information for your employees and employee applicants. Information relating to the contract reference, contract status, and contract type must all be entered. This information can then be used for reporting purposes, or to produce a hard copy of the contract to send to the person for reference and signing.

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

German public sector users can use contracts to control the values of certain fields in the Assignment window. Once you refer an assignment to a contract then fields such as Position, Grade, Employment Category, and Collective Agreement display the values set for the contract, and cannot be updated in the Assignment window. To update these values you must make changes to the contract.

To give your managers access to more complete records for their direct reports, you can display details of their current contracts of employment, as well as any historical contract information, in the My Employee Information pages in SSHR.

You can also display contract details to the My Information pages so that your employees can also view their own information whilst accessing SSHR.

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

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

**Tip:** If the alteration of a hire date results in future-dated changes being before the contract start date, the changes are deleted.

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

## Creating Contract Statuses

Using the Lookup type `CONTRACT_STATUS`, Oracle HRMS enables you to create up to 250 different contract statuses to help track and identify contracts within your enterprise.



### To create contract statuses:

You must create your contract statuses before using the Contracts window to assign contracts.

Use the Application Utilities Lookups Window to create contract statuses for the Lookup type CONTRACT\_STATUS.

1. Enter the lookup code. Adding a prefix to the lookup code defines whether the contract status is active, inactive or obsolete.

- **A-:** You should use this prefix to indicate a contract status is active.
- **O-:** You should use this prefix to indicate a contract status is obsolete.

**Note:** If a contract status has no prefix it is assumed to mean that the contract is Inactive.

2. Enter a meaning and, optionally, a description for the Lookup code.

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Defining Contract Letter Types

To generate a hard copy of a contract you must first write and register an SQL\*Plus script in the same way as if you were generating a standard letter.

For information about writing SQL\*Plus scripts, see: Writing a SQL\*Plus Script for MultiMate or WordPerfect, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The Letter window enables you to link your SQL\*Plus script for the contract with your contract letter type.

**Note:** To set up a contract letter type you must access the Letter window using the Contract Letter Type menu entry. You cannot automatically generate contract letters when the assignment status changes.

### To define a contract letter type:

1. Enter a name for the letter.
2. Select the Concurrent Program Name assigned by your System Administrator to the SQL\*Plus script.
3. Save your contract letter type.

## Entering Contracts

You enter and maintain contracts in the Contracts window.

### To enter a new contract:

1. Set your effective date to the start date of the contract.
2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.

3. Select the status that indicates the contract is active. The period of service dates will also be displayed if a corresponding period of service exists.

See: *Creating Contract Statuses*, page 2-30

4. Select the contract type.
5. Select the status of the contract, such as pending, opened, printed and so on. You must set up document statuses using the user extensible Lookup Type DOCUMENT\_STATUS. Enter the date the document status of the contract changed.

**Note:** The document status is not DateTracked.

6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.
7. Enter further information about this contract if your Oracle localization team has set up the Further Contract Information window.

**For Hungarian users only:** If the duration of the contract is fixed, enter the expiry date as some reports list the contract end date.

8. Save your changes.

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

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

### **Maintaining Contracts**

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

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

### **Deleting Contracts**

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

**Note:** Contracts cannot be date effectively end dated.

#### **To delete a contract:**

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

## Managing Contracts

The Manage Contracts folder enables you to:

- search for different groups of people using a wide variety of criteria
- view basic person information and comprehensive contract information
- initiate a mail merge to produce written contracts
- mass update the document status of contracts
- navigate to the Person, Assignment and Contracts windows.

### Find Contracts

The Find Contracts window automatically displays when you enter the Manage Contracts folder. This enables you to select different groups of people to manage. For example, you can find people who:

- do not currently have a contract
- have a contract with a particular status
- are assigned to a particular organization

You can also show people with all assignments covered by the contract or just their primary assignment.

#### To find contracts:

1. Enter a full or partial query on one, a selection, or all of the available person information:
2. Select whether to find people either with or without a contract. Leave blank to find people with and without contracts.
3. Enter full or partial queries on contract and assignment details using the tabbed regions.

In the Assignment tabbed region you can select to only view the primary assignment and those assignments covered by a contract. A person can be linked to a contract, but they are only covered by a contract when it is linked to a specific assignment.

**Note:** You can generate contracts for a person's assignment that is not covered by a contract. See: *Generating and Printing Contracts*, page 2-34

4. Select Find to find all the employees and employee applicants who match your query.

### Manage Contracts

The Manage Contracts window displays all the employees and employee applicants you have queried. Use standard folder features to select a subset of these records and to choose the fields to view.

If you want to see the personal, assignment, or contract details for a selected person you can select the person and use the buttons to navigate to the required window

**Note:** You must only have one person selected in order to be able to navigate to the Person, Assignment or Contract window.

You can also use the Manage Contracts window to update the document status of a number of contracts at once.

**To mass update the document status of contracts:**

1. Select a person or a number of people with contracts.
2. Choose the Update Status button.
3. Select the new document status, such as pending, opened, printed.

**Note:** You set up document statuses in the Contracts window using the Lookup Type DOCUMENT\_STATUS.

4. Choose OK.

The selected contracts are updated with the new document status.

## Generating and Printing Contracts

Before you generate contracts for your employees and employee applicants in the Manage Contracts window you must ensure any rows returned for a person have a contract reference and assignment number.

If a person does not have a contract reference you can navigate to the Contract window and set up a contract reference.

If a person has multiple assignments, \*MULTIPLE\* displays in the Assignment Number field. You must select an assignment number. The information recorded for the assignment is extracted by your SQL\*Plus script and used as the source of information for the printed contract. You can either select an assignment covered by a contract or an assignment which is not covered by a specific contract.

Selecting an assignment that is not covered by a contract enables you to use different assignment details in your generated contract from those held for the assignment covered by the contract.

For example, you might want to record detailed information against the assignment that is covered by a contract, but include more general information on the printed contract. On the assignment covered by a contract you could set up a location of Building 1, Bond Street office. On the assignment used to generate the contract you could set up a more general location, such as UK Headquarters. By selecting the assignment with the location of UK Headquarters in the Manage Contract window, rather than the assignment covered by the contract, you can print a contract with the less specific information you require. However, you still keep the more detailed information recorded against your person and contract.

**Note:** Selecting an assignment does not permanently link (or cover) an assignment to a contract, it enables you to generate a contract including the information on the assignment. To set up a person's assignment so they are permanently covered you must use the Employment Terms tabbed region on the Assignment or Applicant window.

If you only want to view assignments covered by a person's contract use the Covered By Contract field in the Find Contract window.

**To select an assignment:**

1. Select the list of values button in the Assignment Number field.
2. Select an assignment number for the person and contract.

**To generate a contract:**

1. Select a person or a number of people for which to generate contracts.
2. Choose the Generate Contract button.
3. Select a letter type for the contract in the Generate Contract window.

**Note:** Letter types are set up and linked to SQL\*PLUS scripts using the Letter window accessed from the Contract Letter Type menu entry.

4. Choose OK.

Oracle HRMS runs the SQL\*Plus script for this type of letter and displays the request ID.

5. Query the request ID in the Concurrent Requests window and monitor its progress.

**Note:** Consult your installation guide for details of the location Concurrent Manager places the output or data file

6. If your letters are produced by Oracle Reports, they are ready for printing. If you use your word processor's mail merge facility you are ready to merge the data.

See: Merging the Data File With the Standard Letter MultiMate or WordPerfect, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

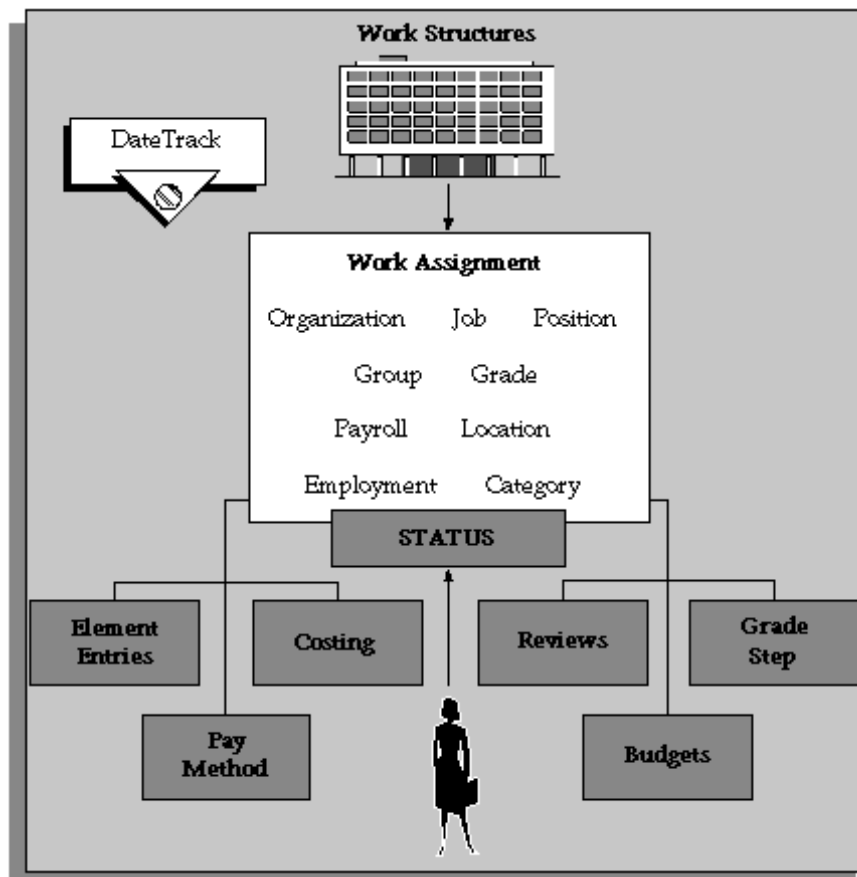
# Employees

## Employee Assignment

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

Many of the activities you undertake in human resource management, such as vacancy management and budget planning, are based around assignments and not people. In particular, you enter many benefit-related elements for the employee assignment, rather than the employee.

### *Employee Assignment*



An employee must have a current assignment at all times. You record changes to existing assignments with the Request for Personnel Action (RPA). For example you use the RPA to appoint someone to a position, promote that person, and terminate the person's assignment. You can also process mass actions such as realignments and transfers that affect employee assignments using the RPA. These changes are datetracked so that you can view the history of changes to an assignment and also make future-dated changes to an employee's assignment.

### **Components of the Assignment**

At a minimum, an assignment defines the Business Group for which an employee works, the date the assignment began, and its current status, such as active or suspended. You can use the assignment to define more precisely the place employees occupy in the agency, including their position, grade, organization, location, and so on.

### **Ending Assignments and Terminating Employees**

Oacle HRMS does not permit an employee to exist in the system without an assignment. That is, an employee must always have at least one assignment at any point in time. You end an employee's assignment by processing an RPA.

See: Workforce and Applicant Termination, page 2-68

## **Employment Information**

Every agency needs to track the changes in employment information for each employee over the lifetime of their employment.

You appoint and manage most changes to employee appointments with the Request for Personnel Action (RPA) and manage other changes, such as most changes to the benefits assigned an employee, through the *employee assignment*:

- The assignment connects employees to your agency's work structures and policies. Changes to the structures and policies are reflected in the employee's records.
- You can query groups of employees with similar assignments (such as all assignments on Grade GS-12) and make changes for each employee in these groups.
- The assignment is datetracked to maintain a work history of the employee as he or she moves through the agency.

The table below summarizes the information typically held for an employee, and how you can hold this information.

### ***Employee Information***

<b>Information</b>	<b>How to set it up</b>
Job	Enter job, position, and organization information in the Position window. You associate locations with organizations in the Organizations window. Complete a Request for Personnel Action to process the employee assignment.
Position	
Organization	
Location	
Grade	
Name of manager or position to report to	Use a position hierarchy or enter the supervisor's name using the Assignment window.
Benefits	Define and link elements; enter values in the Element Entries window.
Full time/part time status	View the employee's work schedule hours under Assignment Standard Conditions
Standard Work Day	Enter an RPA or accept the default from the organization or position to which the employee is assigned. The date is stored in the Extra Information type associated with this action.
Work Schedule	Enter in the Miscellaneous tabbed region of the Assignment window, or accept the default schedule of the organization the employee is assigned to.
Accrual of Paid Time Off for Vacation or Illness	Enroll employee in appropriate accrual plans.
Vacation Entitlement	Define Absence Types and set up increasing or decreasing balances for the employee; enroll employee in appropriate accrual plans.
Sickness Entitlement	
Maternity Entitlement	
Notice Period	You should hold full text procedures and regulations outside the system, perhaps using Oracle Book to hold the information online. You can associate groups of people with different rules or procedures using the People Group key flexfield.
Disciplinary procedure	

## **Employment History**

An employment history is a record of a person's previous periods of service for a different employer. Employers sometimes use these previous periods of employment to calculate an employee's current benefits, for example, leave or sick pay entitlement. You can also record employment history for applicants as part of your recruitment process.

The previous employment information functionality enables you to store information about previous employers and also enter information regarding an person's previous periods of employment. You are also able to specify that a particular employment period is relevant for all assignments or cross-reference previous jobs with the appropriate assignment for the same period.



## Entering Payment Methods for an Employee Assignment

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

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

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

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

To enter payment methods you must:

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

### To enter a personal payment method for remuneration:

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

If the total of the amounts you allocate to payment methods is less than the amount to be paid, Oracle Payroll uses the payment method with the highest priority number to pay the excess.

**For UAE users only:** To specify the method of payment for an employee's end of service remuneration or pension, enter the payment method details, click the Further field, and then select Yes.

5. For everywhere apart from the UK, if the payment method is a magnetic transfer type, open the Bank Details window for entry of information about the employee's bank account.

### To enter a third party payment method:

1. Set your effective date to the date on which to begin making payments using this method.
2. In the Name field, select a third party payment method.

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

3. In the Payee region, select an organization or a person.
4. Save your work.

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

## Entering Previous Employment Details

You enter previous employment information in the Previous Employment Information window.

The Previous Employment Information window is divided into three regions with each region recording separate information about an employee's previous employment. The three regions in the Previous Employment Information window are:

- Previous Employer
- Previous Job
- Assignment - Previous Job Mappings

### To enter previous employment details:

1. Enter the previous employer name.
2. Enter an address.
3. Select a country.
4. Select the type of business.
5. Select a subtype for the business type selected at step 4.
6. Enter a description for the employer.
7. Enter start and end dates for the employee's period of employment. The dates entered automatically calculate the period of service in years, months and days.
8. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
9. Use the Further Information flexfield to enter any additional information defined by your localization team.

**For Hungarian users only** If the employee joined your enterprise mid-year, specify the number of sickness days they have already taken with their previous employer. You can use this information in an accrual plan to calculate their sickness entitlement for the rest of the year.

10. Select the All Assignments check box to specify that the service period is taken into account for all assignments.

**Note:** The All Assignments check box can only be selected if there are no further previous job usages defined in the Assignment region. Once the All Assignments check box is selected no further previous job usages can be defined.

11. Save your work.
12. **Mexico only:** Specify the employee's previous employment details in the Person EIT.

See: *Person Extra Information Types, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

**To enter previous job details:**

1. Select an empty row in the Previous Job region or place your cursor within an existing row and choose the New button to add a new row.
2. Enter start and end dates for the previous job. The job entered must be associated with the employer and period of service entered at steps 1 to 11. The dates entered automatically calculate the period of service in years, months and days.
3. Enter a job title.
4. Select an employee category.
5. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
6. Enter a description for the previous job.
7. Select the All Assignments check box to specify that the previous job period is taken into account for all assignments.

**Note:** The All Assignments check box can only be selected if there are no further previous job usages defined in the Assignment region. Once the All Assignments check box is selected no further previous job usages can be defined.

8. Use the Further Information flexfield to enter any additional information defined by your localization team.

See: Entering Further Previous Job Information.

9. Choose the Extra Information button to open the Previous Job Extra Information window.

See: Entering Extra Information, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

10. Save your work.

**To map previous jobs to an assignment:**

1. Select an empty row in the Assignment region or place your cursor within an existing row and choose the New button to add a new row.
2. Select an assignment to map to a previous job specified at steps 12 to 19.
3. Select a job to map to the assignment selected at step 21. Selecting a job automatically displays the Start Date and End Date fields as specified for the job in the Previous Job region.
4. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
5. Use the Further Information flexfield to enter further previous job usage details.
6. Save your work.

# Contingent Workers

## Contingent Workers

A *contingent worker* is a worker who does not have a direct employment relationship with your enterprise and is typically a self-employed individual or an agency supplied worker.

A contingent worker may perform a role for your enterprise as part of a commercial agreement that exists between the business and the individual or supplier. Alternatively, a contingent worker may perform a role as an intern or a volunteer for your enterprise and have no relationship with a supplier. Additional criteria may apply to the definition of a contingent worker in your localization.

Contingent workers can perform many of the roles that you usually assign to employees (such as Manager or Supervisor), provided that you set the HR: Expand Role of Contingent Worker profile option to Yes.

You do not pay contingent workers via your payroll. Instead, they submit payment invoices to your accounts payable department. Alternatively, you can manage the procurement of contingent workers using Oracle Services Procurement. In this case, contingent workers or their managers can enter time cards using Oracle Time and Labor (OTL) and generate payment invoices automatically.

Note that contingent workers exist as a separate category of worker from short-term or fixed-term contractors who are hired directly by your enterprise and are paid via your payroll.

## Entering Contingent Workers

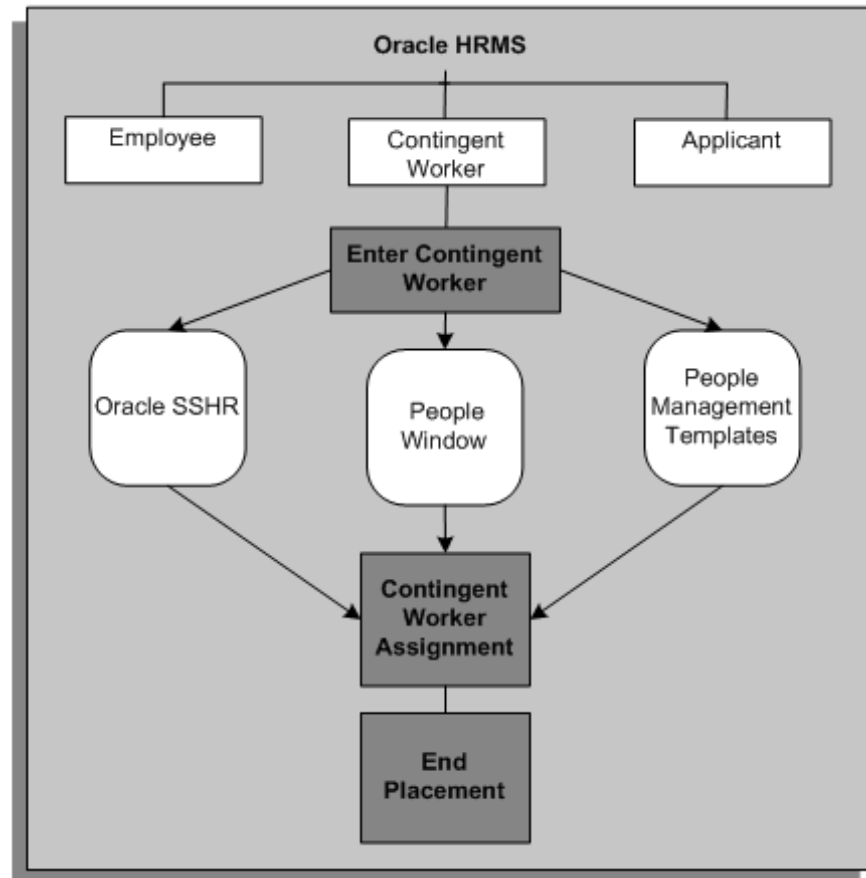
Every enterprise must be able to enter and hold personal information for its workforce. You can enter personal information for contingent workers using the People window or the People Management templates.

You can use the predefined templates without making changes, modify the templates, or create entirely new templates to suit your needs. Oracle HR Foundation also provides contingent worker templates.

### Contingent Worker Support in Oracle SSHR

You can manage the entry, assignment, and termination of contingent workers using Oracle Self Service HR (SSHR). SSHR provides two modules that are specific to contingent workers (Assignment Rate and End Placement), in addition to the Place Contingent Worker workflow process. Contingent workers can maintain their own personal and professional details using SSHR.

## Contingent Worker



## The Contingent Worker Assignment

The contingent worker assignment relates contingent workers to their work structures (such as organization and job). Much of the work structures information you enter for a contingent worker is entered against the contingent worker assignment and not the person. For example, you can enter standard conditions or supplier details against the contingent worker assignment.

When you create a new contingent worker, a default contingent worker assignment is created. Oracle HRMS stores personal information for all workers separately from their assignment information.

### Period of Placement

A contingent worker period of placement relates to the period of time a contingent worker spends with your enterprise. A contingent worker can have a number of concurrent assignments during a period of placement, but there must be one primary assignment at any time during the period. No assignments can start before the period of placement start date or end after the period of placement end date.

### Assignment Rate Types and Assignment Rates

If you install and license Oracle Services Procurement, you can obtain purchase order information, including assignment rates, directly from the purchase order.

If you are not using Oracle Services Procurement, you can record the rates you pay for the services of a contingent worker. You can use this information to reconcile contingent worker invoices from a supplier or self-employed worker. Although you can record this information, you cannot process payments for contingent workers using Oracle Payroll.

The information is held against the contingent worker's assignment and you can record different rates for a single assignment. For example, you could enter a standard overtime rate and a weekend rate for one assignment.

If you install and license Oracle Services Procurement at a later date, any rate information recorded in Oracle HRMS is no longer visible.

## Ending a Placement or Assignment

When a contingent worker leaves your enterprise you end the placement.

You can also terminate individual contingent worker assignments, provided there remains a primary assignment. You terminate an assignment by selecting the assignment status End in the Assignment window.

If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected end date of the assignment. In this case, the projected assignment end date is copied automatically from the purchase order line to the assignment. Otherwise, you can record a projected assignment end date at any time during an assignment.

### Canceling a Placement

You can revert a contingent worker to a previous person type by using the action type Cancel Placement. For example, you enter a person as a contingent worker who has a previous person type of ex-employee. Using the Cancel Placement action type you can revert this person back to being an ex-employee. You cannot use this action type to revert a contingent worker who does not have a previous person type.

## Separating Contingent Workers from Employees Using Oracle HRMS

Oracle HRMS enables you to keep your contingent worker transactions entirely separate from employee transactions.

### Contingent Worker Person Types

So you can identify contingent workers as a separate category of worker from employees, Oracle HRMS provides you with the two system person types *Contingent worker* and *Ex-contingent worker*, to which you can add your own user types as required.

### Contingent Workers and Oracle HRMS Security

Oracle HRMS enables you to limit access to the records of employees, applicants, and contingent workers when you set up a user's security. Using security profiles you can give users access to contingent worker records only. You can also restrict user access to contingent worker records by giving them access to work structures or other criteria in the application to which contingent workers are attached. For example, you could give users access to the contingent worker records in a single organization.

### CustomForm

Many of the windows used in Oracle HRMS are multipurpose windows. For example, the People window can be used to enter and maintain personal details for employees, contingent workers, and applicants. You can create a separate version

of some Oracle HRMS windows to cater specifically for contingent workers using *CustomForm*. For example, you could create your own version of the People window to cater solely for contingent workers.

### **Task Flow**

You can also use *task flow* to limit the access your users have to individual windows. You can link together the windows you want your users to use for a particular task including versions of windows you have created using CustomForm. For example, you might include your own version of the People window and include this in a task flow for entering personal information for a contingent worker.

### **Combining Security Profiles, CustomForm, and Task Flow**

The following example combines the concepts of security profiles, CustomForm, and task flow to show how you can give users access to contingent workers records only:

Firstly you could establish a security profile stipulating that your users only have access to contingent worker records. You do this by selecting an access level of 'none' for the records of employees or applicants and an access level of 'all' for contingent workers. You then link your new security profile to a new responsibility. You could then create a new version of the People window using CustomForm. Your new People window could restrict the actions the user can perform, for example, creating a placement. When you have created the new version of the window you assign it to a menu. Next you remove the windows that are no longer required from the menu and assign the menu to the same responsibility as your security profile. Finally you could create a new task flow and attach it to the window.

## **The Contingent Worker Assignment**

The contingent worker assignment defines the commercial relationship between your enterprise and the supplier. It also defines how the contingent worker is deployed by the business and the conditions of work assigned to them.

The contingent worker assignment relates contingent workers to their work structures. Much of the work structures information you enter for a contingent worker is entered against the contingent worker assignment and not the person. For example, you can enter standard conditions or supplier details against the contingent worker assignment.

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

When you enter a contingent worker, Oracle HRMS automatically creates a default assignment for that contingent worker. This is because a contingent worker must have a current assignment at all times. Any change you make, such as a change of working location, or change in working role, is added to the existing assignment. These changes are datetracked so that you can make future-dated changes in advance and view the history of changes to an assignment.

## **Components of the Assignment**

At a minimum, an assignment defines the HR organization within the business group (which may be the business group itself) for which a person works, the date the assignment began, and its current status, such as active or suspended.

More specifically, you can use the assignment to define the role of the contingent worker in the enterprise, including their job, position, organization, and location. You can also assign contingent workers to contingent worker groups you set up using the People Group key flexfield.

You can assign contingent workers to an assignment category, such as Part Time or Full Time. You set up these categories using the Lookup Type CWK\_ASG\_CATEGORY. Further examples of assignment categories could be Part Time Fixed Hours or Part Time Shift Pattern.

## Multiple Assignments

If your enterprise permits contingent workers to work in two or more different capacities at once you can enter multiple assignments for them. A contingent worker can have multiple assignments, but only one is the primary assignment. Any others are *secondary*.

Relocations, changes in job role, and so on go on record as datetracked changes to contingent worker existing assignments. You do not enter new assignments for such changes.

## Managing Multiple Assignments

Oracle HRMS separately manages each assignment. When a contingent worker has more than one assignment, one assignment is designated the primary assignment. When you enter a contingent worker (by entering a person as a contingent worker, or by changing the person type to contingent worker), Oracle HRMS automatically creates a primary assignment for that person. (The Primary box is automatically checked in the Miscellaneous tabbed region of the Assignment window).

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

You can end all assignments except the primary assignment by entering a status change of End in the Assignment window. To end a contingent worker's primary assignment, you must terminate the placement.

Alternatively, if a contingent worker has more than one assignment you can change the primary assignment to become a secondary assignment and change one of the other secondary assignments to become the primary assignment. You can then enter a status change of End for the former primary assignment in the Assignment window.

## Managing Changes in Assignment Information

When a contingent worker experiences changes such as a change in job role, or moves from full time to part time, you change a component of the assignment. A change to any of the assignment components produces the DateTrack prompt.

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

By changing your effective date, you can see the contingent worker assignment at any point in time. You can also view the changes made to the assignment over time using DateTrack History.



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

## Ending Assignments and Terminating Contingent Workers

In Oracle HRMS, a contingent worker must always have at least one assignment. If a contingent worker has a single assignment, the only way to end the assignment is to end the placement.

If a contingent worker has more than one assignment, you can end all but one of their assignments by selecting the assignment status End in the Assignment window. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the projected assignment end date is copied automatically from the purchase order line to the assignment. Otherwise, you can record the projected assignment end date at any time during the assignment.

## Contingent Worker Suppliers

Contingent workers are workers who do not have a direct employment relationship with your enterprise. Instead, the enterprise usually obtains its contingent workforce by agreement with preferred suppliers. Typically, when roles suitable for contingent workers arise and there is no existing agreement with a supplier, the enterprise:

- Creates a formal definition of the roles
- Supplies specifications to potential suppliers
- Evaluates supplier responses to requests for quotation (RFQs)
- Negotiates contracts with selected suppliers
- Awards contracts to suppliers when agreement is reached

## Defining Suppliers

If you use Oracle Services Procurement to manage the procurement of contingent workers, you record information about suppliers, sites, and purchase orders using Oracle Services Procurement. This information is available automatically to Oracle HRMS users in the Supplier and Site fields on the Supplier tab page of the Assignment window for contingent workers.

If you do not use Oracle Services Procurement, you can record information about suppliers and supplier sites using the Customer and Supplier Setup menu in Oracle HRMS. To access this menu, you can use the supplied Customer and Supplier Maintenance responsibility. Alternatively, you can add the Customer and Supplier Setup menu, or individual functions from the menu, to an existing menu that users can access using their standard responsibilities.

Supplier and site information that you enter using the Customer and Supplier Setup menu functions is available to Oracle HRMS users in the Supplier and Site fields on the Supplier tab page of the Assignment window for contingent workers.

## US Federal Contingent Workers

Contingent workers occupy agency positions, supervise federal employees, approve Requests for Personnel Actions (RPAs), and participate in complaint tracking processes. When you assign and manage contingent workers, you do not use RPAs as you would for employees. Instead you assign and manage contingent workers by entering and updating information directly in the Person, Assignment, and Position windows. To expedite data entry, you can also enter information using the contingent worker People Management templates.

To record pay-related information, you can enter the rates that suppliers charge you for contingent worker services using the Assignment Rates window. (Contingent workers are not paid using payroll, so you do not use the element entries window.)

If you decide to hire a contingent worker, you can enter the worker as an applicant and when the person's period of placement ends, appoint that person. As soon as you create the applicant entry, the product applies the standard protections in the Person and Assignment window, allowing you to view but not change protected data you previously entered in protected fields. Later when you appoint the ex-contingent worker, the application updates this protected data with the values entered in the Appointment RPA.

See: Processing US Federal Contingent Worker Information, page 2-48

## Processing US Federal Contingent Worker Information

When you perform tasks to create, update, or end a contingent worker placement, you enter information directly in the Person and Assignment window or the People Management templates. The following list identifies common processes, notes exceptions to the global processing, and refers you to topics for specific instructions.

**Note:** Where cross-referenced topics include instructions for employees and contingent workers, refer to these topics for contingent worker information only.

### 1. Common Contingent Worker Processes

- Entering people

You can enter and maintain personal information about a contingent worker using the People window or the People Management templates.

If you use the People window, the application protects the Prefix and Suffix fields but allows data entry in normally protected fields, such as Registered Disabled, Ethnic Origin, and Veteran Status. When you end the contingent worker's placement and make that person an applicant, the application displays but protects these fields from update. After you appoint the employee, the application replaces this data with the data entered in the Appointment RPA.

Like employees, contingent workers have an identifying number. You define how the application generates this number when you set up your business group.

If the contingent worker's responsibilities in the agency include supervising other employees, you can also designate the contingent worker as a supervisor.

See: Entering a New Person, page 2-17, Entering Additional Personal Information, page 2-20, Entering Contingent Worker Information, page 2-87, Running the Change Person Numbering to Automatic Process, *Enterprise and Workforce Management Guide*

See: Adapting and Creating a New Business Group, *Enterprise and Workforce Management Guide*

- Assigning positions

You do not use an RPA to assign contingent workers positions within the agency. When you create a placement for a contingent worker, you can use the People Management templates to quickly record the essential assignment information, or the Assignment window and Assignment Extra Information types to enter and update a full range of assignment details.

**Note:** Although the topics for contingent worker describe multiple assignments, as of this release Oracle US Federal HR supports single assignments.

See: Entering an Assignment, page 2-62, Entering Additional Assignment Details, page 2-58, Entering Contingent Worker Information, page 2-87, Maintaining Contingent Workers, page 2-87

- Updating position information

Unlike positions assigned to employees, after you assign the position, you can continue to update position information and position extra information. You can also enter information in two fields that are normally protected, Location and Position Availability Status (Hiring Status).

See: Defining a Position, *Enterprise and Workforce Management Guide*, Updating a Position, *Enterprise and Workforce Management Guide*

- Entering pay-related information

You do not enter element entries or payroll information for contingent workers. Instead you capture the rates charged by suppliers in the Assignment Rates window.

See: Entering Assignment Rates for Contingent Worker Assignments, page 2-51

- Routing Position Descriptions and RPAs

If the contingent worker's responsibilities include routing or approving position descriptions or RPAs, you can add their user names to routing groups, groupboxes, and routing lists.

**Note:** If a contingent worker approves an RPA, the NPA displays that person's name, but not the title unless you have entered the position's title in the US Federal Position Group 1 Position Extra Information.

See: Setting up Routing Groups, Groupboxes, and Routing Lists, *Configuring, Reporting, and System Administration Guide*

- Securing data

Federal security adds support for contingent worker security. For example, the Security Profiles window includes a View Contingent Workers option. A user profile option enables you to restrict the level of security users have at Site level.

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

- Viewing data for contingent workers

You can query and view information about a contingent worker using the Person Summary window.

See: Summarizing Employee Data, page 2-26

- Tracking complaints

You can record information about contingent workers who are involved in the complaint process. For example, contingent workers can become complainants, class agents, or other persons involved in a complaint such as a witness or administrative judge.

See: Complaint Tracking Overview, *Enterprise and Workforce Management Guide*

- Terminating a Placement

After a period of placement concludes, you can end the contingent worker's assignment. If you mistakenly terminate the assignment, you can use the same window to reverse the termination.

See: Ending a Placement, page 2-70

- Appointing an ex-contingent worker

You can appoint ex-contingent workers after ending their period of placement. If you want to begin that process while the person is still a contingent worker, you can create an applicant entry for that person. Later when the placement ends, you can process the Appointment action.

See: Hiring an Applicant, page 1-19, Earliest Hire Dates , page 1-17

## Defining a Combination of Assignment Rate Type and Basis

Use the Assignment Rate Types window to associate an assignment rate type with a rate basis for contingent workers.

**Note:** If you use Oracle Services Procurement to provide purchase order information for contingent workers, you do not need to perform this task.

### To define a combination of assignment rate type and basis:

1. Enter a name for this combination of assignment rate type and basis.
2. Select a rate basis for the rate type. The basis (for example, Hourly Rate or Weekly Rate) identifies the period to which the rate type relates.
3. Select a rate type (for example, Standard Rate or Weekend Rate).

**Note:** The combination of name and rate type must be unique.

4. Save your work.

To define a contingent worker's assignment rate, you associate this combination of assignment rate type and basis with a currency and monetary value.

See: Entering Assignment Rates for Contingent Worker Assignments, page 2-51

## Entering Assignment Rates for Contingent Worker Assignments

**Note:** This procedure applies only if you are **not** using Oracle Services Procurement to provide purchase order information for contingent workers.

If you use Oracle Services Procurement, the Assignment Rates window displays information from the purchase order line for this assignment. You cannot update this information in the Assignment Rates window.

Although you cannot pay contingent workers using Oracle Payroll, you can record their rates in Oracle HRMS. For each contingent worker assignment, you select a predefined combination of rate type and basis and associate it with a currency and monetary value, known as an **assignment rate**.

Use the Assignment Rates window.

### To enter a rate for a contingent worker assignment:

1. Set your effective date to a date early enough for any historical information you want to enter.
2. Select the name that identifies the required combination of rate type and basis.  
See: Defining a Combination of Assignment Rate Type and Basis, page 2-50  
The Rate Type and Rate Basis fields are completed automatically.
3. Select a currency for the assignment rate.
4. Enter a monetary value for the assignment rate. For example, if the rate type is Weekend Rate and the basis is Hourly Rate, enter the hourly rate for weekend assignments.
5. Repeat steps 2 through 4 for additional assignment rates.
6. Save your work.

If you install and license Oracle Services Procurement at a later date, any rate information recorded in Oracle HRMS is no longer visible.

## Starting a Placement for an Ex-Employee or Ex-Contingent Worker

Use the People window to start a new contingent worker placement for an ex-contingent worker or an ex-employee.

**Note:** To hire the ex-employee as a contingent work, you start a placement. To rehire an ex-employee, you use an RPA as explained in Rehiring an Ex-Employee, page 1-19. .

Oracle HRMS supports back-to-back placements and employment, even when there is a difference in people types. As a result:

- Ex-contingent workers can begin a new placement on the day following the end of their latest placement.
- Ex-employees can begin a contingent worker placement on the day following the termination of their employment.

**To start a placement for an ex-contingent worker or ex-employee:**

1. Set your effective date to the placement start date.
2. Query the ex-contingent worker or ex-employee in the People window.
3. In the Action field, select Create Placement.
4. In the Person Type for Action field, select a person type. If only one person type is valid for the action, it appears automatically.
5. Save your work.

# Workforce Information Management

## Assignment Statuses

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

**Note:** You do not process contingent workers in a payroll run.

When you approve and update to the database a Request for Personnel Action (RPA) for an employee, the application updates the assignment status. For example, when you approve an employee for a furlough, the status changes from active to suspend.

When you install the application, you install a set of predefined system statuses and associated user statuses.

## System Statuses

There are four system statuses for employee assignments:

- **Active Assignment:** For employees and contingent workers you use this status to show that the person is working in accordance with his or her usual conditions of working.
- **Suspend Assignment:** For employees you use this status to show that an employee is on leave of absence, but remains an employee with your enterprise. Similarly, for contingent workers the suspend assignment indicates that a contingent worker is not currently working on the assignment. For example, the contingent worker may have taken an unauthorized absence or the results of an internal review placed the worker on suspended assignment.
- **Terminate Assignment:** Use this status to show that your agency no longer employs the person in that assignment. You can make payments through Oracle Payroll for assignments at this status. This status is not available for use with contingent workers.
- **End:** If you use multiple assignments, use this status to end all but the primary assignment. This status causes the assignment to end but is not recorded. For employees, this status indicates that all payroll processing for the assignment is complete and the assignment becomes an historical record.

For information about system statuses for applicants see: Applicant Assignment Statuses, page 1-9.

## User Statuses

A user status associated with a system status is called a *primary* status because it determines how the system processes the assignment. You can also define *secondary* statuses not associated with a system status. You use secondary statuses for analysis and reporting, but not to control pay processing for assignments. When you use Oracle HRMS, you only see the user statuses. There are 14 predefined user statuses for employee assignments:

**Note:** Do not change these user statuses. The application uses these values to update the Assignment status after you update an RPA to the HR database.

- **Active status:** Active Appointment, Detail NTE, Temporary Appointment NTE, and Temporary Promotion NTE.
- **Suspend status:** Furlough, Furlough NTE, Leave Without Pay NTE, Leave Without Pay Military, Non Pay/Non Duty Status, Sabbatical NTE, Suspension NTE, and Suspension Indefinite.
- **Terminate status:** Terminated Appointment and Separated.

As with employee assignment statuses, there is a set of system statuses for applicants:

- **Active Application:** Use this status as an application progresses through the selection stages.
- **Offer:** Use this status for your preferred candidate when you make an offer
- **Accepted:** Use this status when you have update the preferred candidate's assignment to Accepted and are ready to appoint an employee or hire a contingent worker..

## Using Assignment Statuses to Control Compensation

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

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

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

## Secondary Assignment Statuses

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

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

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

To enter reasons for giving secondary statuses to assignments, define valid reasons as values for the Lookup Type EMP\_SEC\_ASSIGN\_REASON (for employee assignments), CWK\_SEC\_ASSIGN\_REASON (for contingent workers), and APL\_SEC\_ASSIGN\_REASON (for applicant assignments).



## Setup To Allow Processing After Termination

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

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

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

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

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

## Assignment Status Types

The system has four Assignment System Status types that it maintains: Active Assign, Suspend Assign, Terminate Assign, and End Assign. Oracle Federal HR has defined other *user* assignment statuses to reflect the different nature of actions processed, which are described in the table below:

### ***Assignment Statuses***

<b>Assignment Status</b>	<b>Oracle System Status</b>	<b>Nature of Action Codes</b>
Active Appointment	Active	100, 101, 107, 120, 124, 130, 132, 140-147, 150, 151, 155-157, 170, 198, 199, 500, 501, 507, 520, 524, 540-543, 546, 550, 551, 555, 570
Furlough	Suspend	471
Furlough NTE	Suspend	472
Leave With Pay NTE	Suspend	462
Leave Without Pay NTE	Suspend	460
Leave Without Pay Mil	Suspend	473
Non Pay / Non Duty Status	Suspend	430
Sabbatical NTE	Suspend	480
Separated	Terminate	300, 301, 303, 304, 312, 317, 330, 350, 356, 390
Suspension NTE	Suspend	450
Suspension Indefinite	Suspend	452
Temporary Appointment NTE	Active	108, 112, 115, 122, 148, 149, 153, 154, 171, 190, 508, 512, 515, 522, 548, 549, 553, 554, 571, 590, 703, 741, 750, 760, 762, 765, 769, 770, 772, 773
Temporary Promotion NTE	Active	703
Terminated Appointment	Terminate	351-353, 355, 357, 385

## **Assignment Extra Information Types**

You can define as many Extra Information Types (EITs) as you require to hold information about assignments. There are also some predefined assignment EITs.

**Note:** To be able to access the predefined EITs, you must link the EIT to your responsibility.

See: *Setting Up Extra Information Types Against a Responsibility, Configuring, Reporting, and System Administration Guide*

The predefined US Federal person EITs are:

- US Federal Assignment NTE Dates - captures Not to Exceed information, such as start dates for an NTE assignment, leave without pay, furlough, suspension, sabbatical.
- US Federal Assignment Non SF52 - records information about the assignment not required to process an RPA, such as part-time indicator, whether the assignment requires key emergency personnel or a non-disclosure agreement.

- US Federal Assignment SF52 - stores information about the assignment when you update an appointment RPA or assignment-related RPA, such as step, tenure, pay rate determinant, and work schedule.

**Note:** Benefits Assignment Extra Information stores Oracle Advanced Benefits information.

## Defining Assignment Statuses (Assignment Window)

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

### Defining Primary User Statuses

#### To rename a user status:

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

#### To supply additional user statuses for a system status:

1. Insert a new record.
2. Type in your user status, and select a Human Resource system status.
3. If you are using iRecruitment, you can enter an external status for your applicant assignment user statuses. This status is displayed to candidates in iRecruitment. For example, you may want to create an external status of 'Interview' for applicant assignment user statuses of 'Pending Interview' and 'Interview Passed'. The candidate in iRecruitment would see the external status and the manager would see the user status names.
4. Select a Human Resource system status.
5. For employee assignment statuses, you must also select a Payroll system status. You must do this, even if you do not have Oracle Payroll. If you have Oracle Payroll, the payroll system status controls whether payroll processes the assignment in a payroll run.

**Note:** If you select a payroll system status of Do Not Process, payroll will still create assignment actions for assignments with this status. It is these assignment actions that will not be processed.

6. Save the new status.

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

When you update the assignment statuses, the application saves the changes in the PER\_ASS\_STATUS\_TYPE\_AMENDS table instead of the PER\_ASSIGNMENT\_STATUS\_TYPES table.

You cannot delete a user status, but you can prevent its use by deactivating it. To deactivate agency-defined user statuses, deselect the Active check box.

**Caution:** Do not deactivate user statuses predefined and used by the US Federal HR application.

### Defining Secondary Statuses

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

#### To create a secondary status:

1. Insert a new record.
2. Type in a user status and do not select a system status.

The Type field displays *Secondary*.

## Entering Additional Assignment Details (Assignment Window)

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

When assignment information is not applicable for contingent workers, the application hides the corresponding tabbed regions.

#### To change information in the GREs and Other Data window:

When an RPA is updated to the HR database, the application enters the GRE of the To Organization in the GREs and Other Data tabbed region. If a GRE is not available, the application enters the GRE of the Business Group.

1. Select the GRE (Government Reporting Entity) for the assignment from the list of values.

The GRE is the federal Employer Identification Number (EIN) that you entered for the position's organization when you set up the organization.

#### To enter salary information:

1. Choose the Salary Information tabbed region.
2. Enter the frequency of salary and performance reviews.

#### To enter supplier information for a contingent worker:

You use the Supplier tabbed region to record information about the supplier providing the contingent worker to your enterprise. The procedure depends on whether you are using Oracle Services Procurement to provide purchase order information for contingent worker assignments.

#### If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

**Note:** The Supplier tabbed region does not display for employees.

2. Select the names of the supplier and the supplier site for the contingent worker.

3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

**If you are using Oracle Services Procurement:**

1. Choose the Supplier tabbed region.
2. Select a purchase order number for this assignment.
3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.
4. Information from the purchase order appears automatically in the Supplier Name and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.
5. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

**To enter supervisory information:**

1. Choose the Supervisor tabbed region.
2. Select the name and number of the worker's personal supervisor. If you use assignment-based supervisor hierarchies, select the supervisor's assignment number.

You can select a contingent worker as a supervisor only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.

You can select a supervisor from another Business Group if the HR:Cross Business Group user profile option is set to Yes at your site.

**Note:** The application does not update this information. Use organization and position hierarchies to show management reporting lines.

The supervisor field is required if:

- You are using Self-Service Human Resources
- You indicated during implementation that the application send Within-Grade-Increase requests to the supervisor

**Note:** This information is not updated by the system. Use organization and position hierarchies to show management reporting lines.

**To enter standard conditions information for an employee or contingent worker:**

To enter schedule information for a person, you can:

- Set up extensive availability information such as, shifts, schedules, and calendar events using integrated features from HRMS and Common Application Components (CAC).

See: *Setting Up Availability, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

- Set up holiday calendars, shifts, and work plans in OTL.

See: Time Management Structures, *Oracle Time and Labor Implementation and User Guide*

Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the Assignment window.

**Important:** The application does not use the schedule information that you can enter here to determine a worker's availability. This is for information purposes only.

The decision for which method to set up is based on knowledge of which applications use which information.

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

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent worker assignment, if required.
3. This step is for employees only. For benefit administration, enter whether the assignment is hourly or salaried. If you are in the US, benefits are often based on whether a person is paid hourly or receives a salary.

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

#### **To enter primary assignment and miscellaneous information:**

1. Choose the Miscellaneous tabbed region.
2. Enter the internal address details (such as the floor or office number), if required. The application adds the details to the location address.
3. If you are changing a contingent worker's assignment, select a reason for adding or changing the assignment. You define valid reasons as values for the Lookup Type CWK\_ASSIGN\_REASON (for contingent workers).
4. Select the Manager box if the assignment is at manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.).
5. By default, the first assignment entered is the primary assignment, and the Primary box is automatically checked.
6. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the date appears in the Projected Assignment End field. Otherwise, enter the projected end date of the assignment.

### **To enter a billing title for an employee or contingent worker (Oracle Projects only):**

1. Choose the Project Information tabbed region.

**Note:** The Project Information tabbed region displays only if you have installed Oracle Projects.

2. Enter a billing title. The information you enter in the Billing Title field serves as the default title on project customer invoices. You can override this information using Project Accounting.
3. Enter a project title.

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

1. Choose the Bargaining Unit tabbed region.
2. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized collective negotiating organization.

**Note:** You set up your different bargaining units as values for the Lookup type BARGAINING\_UNIT\_CODE

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

### **To enter employment terms:**

1. Choose the Employment Terms tabbed region.
2. Select the contract that is to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment start date.
3. Select the agreement grade structure for the collective agreement. A window is displayed showing the grade factors for that grade structure.
4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet that criteria.

If you enter values directly into the grade factor fields, they must correspond to an existing reference grade unless the Override Allowed check box in the Agreement Grades window is checked

**Note:** Any new combinations of values that you enter will not be available for reuse with other assignments. In order to reuse a combination, you must define it as a reference grade in the Agreement Grades window.

## **Entering Additional Employment Information**

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

1. You can make non-RPA entries to the earnings, deductions, benefits and other elements for which the employee is eligible in the Element Entries window.

See: Making Manual Entries, *Compensation and Benefits Management Guide*

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

See Data Costed at the Organization and Assignment Levels, *Oracle HRMS Enterprise and Workforce Management Guide*

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

See Budgeting Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

4. You can enter Extra Information about your employee's assignment using the Assignment Extra Information window.

See: Entering Extra Information, *Configuring, Reporting, and System Administration Guide*

5. You can enter previous employment information for your employee's using the Previous Employment window.

See Entering Previous Employment Details, page 2-40

## Entering a New Assignment

You can *view* an employee's new assignments in the Assignment window.

1. **Use an RPA to enter an assignment**

You use the Request for Personnel Action (RPA) to:

- Appoint an employee
- Update the assignment information
- Assign basic compensation and benefits

2. **Use the Assignment window to complete non-RPA information**

The application prevents you from updating information in the Assignment window that requires an RPA. Protected fields also include tabbed regions that store information entered elsewhere in the application, and information that is not applicable for the product, such as Special Ceilings.

When you appoint someone, you complete extra information that stores relevant assignment information.

See: Assignment Extra Information Types, page 2-56

3. You can enter non-RPA information, such as supervisor details.

You can use the Oracle HRMS and Common application Components (CAC) integrated schedule features to assign a schedule to the worker's assignment. If you want the application to only display schedules the worker is eligible for, then run the Eligibility Engine process for the worker.

See: Setting Up Availability, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

4. The Assignment window also contains a taskflow button for the Element Entries window. Here you can view the compensation and benefit elements assigned by previous actions, and assign non-RPA based benefits and pay.



## Changing Assignment Information

When you process an RPA that changes an employee's assignment, such as a promotion, transfer, or move from full-time to part-time position, the application keeps a history of these changes.

Changing any assignment component can have the following effects:

- The employee may lose eligibility for some compensation types, benefits or deductions, and gain eligibility for others. You receive a warning that the application automatically ends any unprocessed element entries for which the employee is no longer eligible.
- The employee may have a different level of access to the application since security is based on assignment to work structures.

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

### To view changes to the assignment:

1. Change the effective date in the Assignment window to the date you want to view.

**Note:** Use the Assignment History window to view the history of all the employee's assignments, both currently and in any previous periods of service.

## Removing Title from Person Search Lists

To remove the title from existing records without updating them you should run the Remove Title from Person's Full Name concurrent process. This concurrent process enables you to remove the title so that it does not appear in Person Search lists, such as the Find window on the Person window.

You run the Remove Title from Person's Full Name concurrent process from the Submit Requests window.

### To remove title from person's full name:

1. Select Remove Title from Person's Full Name in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select a legislation.
4. Choose the OK button.
5. Choose the Submit button.

## Using Mass Applicant Assignment Update

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

## Process Overview

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

## Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.
Validated New Record(s)	Target validated successfully.

## Performing a Mass Applicant Assignment Update

To make mass assignment updates for applicants, use the Mass Applicant Assignment Update window.

### To identify the records you need to update:

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply)..
3. If the People Group Flexfield window is not already open, click in the People Group field.
4. Specify any people group search criteria.
5. To exclude records from the result set defined by the people group search criteria, choose Combinations.

The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify applicants to be removed from the group of applicants

identified by the people group search criteria. For example, if you select a particular professional organization in the People Group Flexfield window, and a geographical region in the Enter Reduction Criteria for Long-List window, the result set comprises all members of the selected professional organization, minus those in the selected geographical region.

6. If the Criteria window is not already open, click in the Other Criteria field.
7. Enter or select recruitment and work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all applicants for jobs that begin "MGR".
8. Choose OK.

#### **To retrieve the identified records**

9. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.

The application displays assignment records that meet the selection criteria.

10. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

#### **To specify the changes you want to make**

11. Choose the New tab.
12. Click in the Change List field.  
The Change List window appears.
13. Select or enter values in fields you want to update. Choose OK.
14. In the People Group Flexfield window, select or enter values in fields you want to update. Choose OK.
15. Select a DateTrack mode.

#### **To apply your changes and submit them to the database**

16. Choose Create New.

The updated assignment records appear.

17. To make further general changes to these records before you submit them to the database, repeat from Step 12.
18. To update information for an individual applicant, update the relevant record on the New tab.

**Note:** Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

19. To commit the updated records to the Oracle HRMS database, choose Submit.

The application creates a concurrent request and displays its identifier. View the results in the View Requests window.

Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See *Reviewing and Correcting Mass Assignment Update Errors*, page 2-66

## Reviewing and Correcting Mass Assignment Update Errors

When you submit a mass assignment update to the Oracle HRMS database, the application creates a concurrent request and displays its identifier. For each concurrent request, the application creates an error log file containing details of any errors. Note that Oracle HRMS does not apply invalid changes to records.

To view the results of a mass assignment update, use the Requests window.

### To review the error log:

1. In the Find Requests window, enter the concurrent request ID of the mass assignment update.
2. In the Requests window, select the request and choose View Log.

The error log appears, showing mass assignment update errors grouped by assignment number. For each error, the log includes a description of the cause and a suggested action.

### To correct the error:

Use the Mass Assignment Update window (for employees and contingent workers) or the Mass Applicant Assignment Update window.

1. Retrieve the relevant mass assignment update. Records in error have the status Error New Record(s).
2. Select the records you are correcting and deselect all other records.
3. Correct the requested changes or the DateTrack mode (as suggested in the error log) for relevant records.

**Note:** You cannot update records whose status is Completed.

4. Choose Submit.

Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

If an attempted update fails repeatedly, edit the assignment record directly.

## Purging Transaction Data

Transactions such as mass updates, position transactions, and budget worksheets all store temporary data in transactions tables in your database. Once the transaction has been completed, the data in these tables is applied to permanent tables. However, a duplicate version of this data also remains in the temporary tables, taking up unnecessary space.

To clear this data once a transaction is completed, you can use one of the purge processes, depending on the type of transaction you have completed.

**Note:** These processes do not affect any applied data. All applied information is still available to edit in the normal windows.

Use the Submit Request window.

**To run the Purge Budget Worksheets, Purge Position Transaction, or the Purge Mass Processes process:**

1. Select either Purge Budget Worksheets, Purge Position Transaction, or Purge Mass Processes in the Name field.
2. Click in the Parameters field to display the Parameters window, if it does not open automatically.
3. If you are running the Purge Mass Processes process, select the type of transaction you want to purge, for example, Mass Applicant Assignment Update, or Position Copy.
4. Select the status of the transactions you want to purge. This limits the transactions purged to only those with the selected status.
5. Enter the dates between which you want transactions cleared.
6. Click OK. You can view a log file containing details of the purge from the Requests window.

# Workforce and Applicant Termination

## Workforce and Applicant Termination

You can terminate employees, contingent workers, and applicants and record the reasons for termination. If circumstances change, you can also reverse terminations.

### Terminating an Employee or Contingent Worker

You terminate an employee or contingent worker's assignment when that person leaves your agency. When you terminate an employee assignment, you process a Separation RPA.

See: Terminating an Assignment, page 2-69

When you terminate a contingent worker's assignment, you end the period of placement in the End Placement window. This action changes the person type to Ex-contingent Worker and ends all assignments. If a contingent worker remains, you can continue that person's assignment by cancelling the end placement action.

See: Ending a Placement, page 2-70

If you use the Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the projected assignment end date is copied automatically from the purchase order line to the assignment. Otherwise, you can record the projected assignment end date at any time during the assignment.

### Terminating an Application

When you reject an application for employment you terminate the application. Oracle HRMS enables you to terminate a single application from an applicant with multiple applications or terminate all outstanding applications for an applicant.

If you want to terminate a single application from an applicant with multiple applications you can do this by updating the applicant assignment status to Terminate Application.

If you want to terminate all applications for an applicant you can do this by entering a termination date. This is the minimum amount of information required for this type of applicant termination. You can choose to record further information including:

- Reason for rejecting the application
- Terminated user person type
- Terminated applicant status

See: Rejecting an Application, page 1-15

You can also use Oracle HRMS to generate a formal rejection letter.

See: Letter Generation, *Configuring, Reporting, and System Administration Guide*

### Canceling a Termination

If the employee decides not to leave, or the date of leaving changes, you can process a Cancellation or Correction on a termination action provided that you have not rehired that person.

The application does not end date the People Extra Information or Special Information. If you change this information after the termination and then rehire the person, the information entered in the interim is in effect as part of the person's record.

See: Canceling a Termination, page 2-71

## Terminating an Assignment

In Oracle HRMS, an employee must have at least one assignment. You can end this assignment by processing a Separation RPA. When you terminate an employee, you can grant a Separation incentive as a secondary nature of action to the termination action.

See: Processing Separation Incentive Actions, *Oracle HRMS Compensation and Benefits Management Guide*

Use the RPA window.

### To terminate an employee:

1. Initiate an RPA action that terminates the employee's assignment.
2. On the Requesting Info tab, enter the effective date, the employee's name, the nature of action code and the legal authority code.
3. Complete, route, approve, and update the action according to your agency's practices.

See: Processing a Request for Personnel Action, page 3-15

When the application updates a termination or Separation action to the database, it:

- Changes the person type to ex-employee
- End-dates the ex-employee's elements and removes that person from payroll
- Replaces that person's primary address in the Person window with the forwarding address entered on the RPA
- Initiates a Termination Life Event for the employee's health benefits

**Note:** As of the current release, the application creates this life event for HR only implementations (HR: User Type system profile set to HR User) and not for HR with Oracle Payroll implementations.

- Updates the Terminate window

If Oracle payroll is not installed (HR: User Type system profile option set to HR User), the application updates the Terminate window with the Actual and Final Process dates based on the effective date of the termination action.

If Oracle payroll is installed (HR: User Type system profile option set to HR with Payroll), the application updates the Terminate window with the Actual Process date based on the effective date of the termination action. The Final Process date is left blank, so that you can make corrections to the final payment or make other payments to the employee in the future if this is necessary.

The Final Process date is the last date on which you can process payments for a terminated employee, if you are using Oracle Payroll. To process unanticipated late payments or to make corrections, you can change the Final Process

date, provided the new date does not conflict with other information held for the employee.

See: Updating an Employee's Final Process Date, page 2-71

- Routes future-dated actions back to the Personnelist

If the employee has future-dated actions, when the termination is updated to the database, the application automatically routes the future dated actions back to the Personnelist or Approver who submitted the actions for update. The Personnelist or Approver can then correct, cancel, or resubmit the actions.

### Viewing Termination Records

You can only access the information stored in the Assignment window for someone who has an Active Assignment status. After you terminate an employee, you can no longer view that person's Assignment or element information unless you change the effective date in the People window to the ex-employee's period of service.

### Terminating Health Benefits

When you update a Separation action, the application initiates a Termination life event. When the concurrent manager program for processing life events runs, the application de-enrolls the ex-employee from FEHB. If your system administrator has not set the concurrent program Participation Process: Life Event to run periodically, you can use the Submit Request window to run the process.

The Termination life event ends the person's health benefits as of the effective date of the Separation action.

See: Running the Participation Batch Process, *Oracle HRMS Compensation and Benefits Management Guide*

## Ending a Placement

When a contingent worker leaves your enterprise, you end the period of placement in the End Placement window. This action changes the person type to Ex-contingent Worker and ends all assignments.

The ex-contingent worker's record remains in the database. You can reinstate the person to create a new period of placement.

### To terminate a contingent worker:

1. Select the termination reason.

**Note:** If you select the termination reason Deceased but have not completed the Date of Death field in the Other tabbed region of the People window, that field is set to the actual termination date.

2. Enter the actual termination date.
3. Select a termination person type value.

**Note:** You enable the Termination Person Type field only when you enter the actual termination date. When you enable the field, it contains the value Ex-contingent Worker (or your enterprise's user name for this person type) by default.



4. Choose the Terminate button to complete the termination.

You can reverse a termination for a contingent worker.

See: Canceling a Termination, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

If you mistakenly add someone to the database or you want to remove all records for an ex-contingent worker, you can delete the person in the Delete Person window.

See: Deleting a Person from the System, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

## Canceling a Termination

If the *employee* decides not to leave, or the date of leaving changes, you can process a Cancellation or Correction on a termination action provided that you have not rehired that person. Processing a Cancellation restores that person's active assignment status and element entries.

You can only cancel a Separation action if you have not appointed someone else to that person's position. If you have appointed someone else to the position, move the current occupant to a different position. Use the same effective date that you did when appointing the occupant to the ex-employee's position.

See: Canceling or Correcting an RPA, page 3-34

If a *contingent worker* decides not to leave, or the date of leaving changes, you can cancel a termination. You can cancel a termination at any time provided you have not rehired or started a new placement for the contingent worker.

Oracle HRMS reopens the assignments previously closed down and gives each assignment the status it had before termination. It also restores other information to its state before termination. For example, it removes the end date put on recurring element entries for the assignment. Also, when you terminate a contingent worker, future-dated changes on the assignment are not removed. This means that when you reverse a termination, Oracle HRMS reinstates the elements assigned to the employee or contingent worker prior to termination action being taken.

### To cancel a termination for a contingent worker:

1. Choose the Reverse Termination button in the End Employment or End Placement window.

**Note:** The application clears and disables the Type and Status fields in the End Employment window and the Termination Person Type field in the End Placement window.

### To change the termination date for a contingent worker:

1. Cancel the termination by choosing the Reverse Termination button in the End Employment or End Placement window.
2. Enter a new actual termination date and choose the Terminate button.

## Updating an Employee's Final Process Date

You can change an employee's Final Process date, subject to the following conditions:

- The Final Process date must be later than the Actual and the Last Standard Process dates.
- You cannot change the Final Process date to earlier than completed payroll actions.
- You must specify a value for the Final Process date if the employee has a later period of service.
- If you previously entered a Final Process date equal to the Actual or the Last Standard Process date, you cannot change the Final Process date to later than the Actual or the Last Standard Process date.
- If you previously entered a Final Process date later than the Actual or the Last Standard Process date, you cannot set the Final Process date equal to the Actual or the Last Standard Process date.

**Note:** If you must set the Final Process date equal to the Actual date since the employee has no activity or assignment between the two dates, the best practice is to reverse terminate the employee and terminate with the new dates. You can follow the same practice to change the Final Process date to later than the Actual or the Last Standard Process date (after previously entering them equal).

If you increase the Final Process date, the end date of the terminated assignment is automatically extended. If you make changes to the terminated assignment between the Actual and the Final Process dates, the latest date to which you can decrease the Final Process date is one day after the last change. For example, if the Actual date is April 10 and the Final Process date is April 15, and you make a change to the assignment on April 12, the latest date to which you can decrease the Final Process date is April 13.

**US and Russian Payroll Only:** If you rehire an employee before the Final Process date for their previous period of service, the employee has overlapping periods of service between the rehire date and the Final Process date. You cannot change the Final Process date to earlier than or equal to the Hire date for the next period of service since this causes a gap between the overlapping periods of service. Similarly, for non-overlapping periods of service, you cannot change the Final Process date to later than or equal to the Hire date of the next period of service since this causes the periods of service to overlap.

Use the Terminate window to update an employee's Final Process date.

#### **To update an employee's Final Process date:**

1. **US and Russian Payroll Only:** If you rehired the employee before the Final Process date for their previous period of service, the Terminate window displays the service dates for all the overlapping periods of service. The dates for the latest period of service appear by default. Scroll down for the earlier periods of service.
2. Enter a new Final Process date.
3. Click Save to apply the changes

# Entering Contact Information

## Contact Information Overview

Oracle HRMS enables you to record the ways in which you communicate with the people in your enterprise and the people whom they have a relationship with, such as an employee's partner.

## Entering People as Contacts

You enter people as contact records to identify:

- People to contact in an emergency
- Dependents of the employed person
- Beneficiaries of certain benefits, such as insurance policies or stock purchase plans
- Individuals who receive a wage attachment payment

## Entering Contact Information

Entering contact information includes entering contact details for the people in your enterprise, such as their home address. As an employer, you need to record contact details so that you can contact people either by email, phone, fax or post, and for reporting purposes. For example, in the Netherlands you must record a person's house number for social insurance reporting.

## Adding a City to the Database

If you are entering the address of someone living in a city or town not in the database, you must add the city or town using the Cities window. You are likely to find that cities or towns with a population of less than 250 do not exist in HRMS unless your enterprise has added them already.

### US Only:

After applying the Vertex update and before applying the Oracle Quarterly Statutory Update, you use the Cities window to enter data that creates new Geocode and JIT data. Examples of the data you enter include cities, counties, school districts and zip codes. Oracle Payroll creates user-defined cities with a city code of Uxxx for geocodes with no tax implications, and creates user-defined cities with the state, county and city codes defined by Vertex for geocodes with tax implications.

See: Geocodes, *Oracle HRMS Payroll Processing Management Guide*

See: Adding New Tax Information for an Existing Geocode,

**Note:** For US Federal HR, if your agency uses the National Finance Center (NCF) as a provider, do not add cities. NFC implementations use predefined values for cities based on duty stations.

### To add a city for an address:

1. In the State Name field, select the name of the state or territory in which the city is located. For Canadian cities, select Canada in this field.

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

## Entering People's Addresses at Sites without Oracle Payroll

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

If Oracle payroll is not installed (HR: User Type system profile option set to HR User), the application displays the default United States International Style Address window. You use this window to enter all primary and secondary addresses for employees and their contacts at Oracle HR sites. You can also enter addresses for all the US contiguous states, Military or US Territories, as well as international addresses. The application performs standard validation of field entries, for example, for zip code length and duty station codes and names.

The application uses the US International address style for the forwarding address in a Separation action. When you update the Separation action to the database, the application updates the person's primary address with the forwarding address you indicated in the Separation action. If you have selected a non-US International address style, the complete forwarding address may not appear on the RPA.

If your agency uses the National Finance Center (NFC) as a provider, you must configure the default United States International Style Address window.

See: *Defining the Personal Address Flexfield for NFC, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Use the Address window to enter addresses. You can enter address information either by choosing the taskflow button on the Person form or from the RPA.

### To enter an address:

1. The Style is preset to United States (International). Click the Address field to open the Personal Address window.
2. Enter address information in this window and click OK.
3. Select an address type, such as home or business.
4. To identify the person's main address, select Primary.

By default, the first address you enter is the primary address. You can only have one primary address.

**Note:** If your agency uses NFC as a provider, ensure that the employees primary address corresponds to the employee's primary home address. NFC uses this address for taxation purposes.

5. Save your work.

**To change an address:**

1. Query the address record you want to change.
2. Enter the last date the address is effective in the Date To field.
3. Make the appropriate changes.

For example, select a new address type, or click in the Address field and make the appropriate changes in the Personal Address Information window and click OK.

4. Save your work.

## Entering People's Addresses at Sites with Oracle Payroll

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

If Oracle payroll is installed (HR: User Type system profile option set to HR with Payroll), the application uses the default US Style address for the primary address and the forwarding address in a separation action. When the separation action is updated to the database, the application updates the person's primary address with the forwarding address. If you have selected a non-US address style, the complete forwarding address may not appear on the RPA.

For cities or towns with populations of 200 or less, you may need to enter them in the database. To check whether a city or town name is in the database, query it in the Cities window.

See: Adding a City for Addresses, page 2-73

Use the Address window to enter addresses. You can enter address information either by choosing the taskflow button on the Person form or from the RPA.

**To enter a US or Canadian address with full validation:**

1. Set the effective date to the date the address takes effect.  
  
The start date of the employee's primary address should be the same as or earlier than the new hire date. This preserves the integrity of the employee's records.
2. In the Address lines, enter the street name and number, and any related information such as building name or apartment number.
3. If you know the US zip code or Canadian post code, enter it in the Zip Code field. For US addresses, this restricts the listing of cities, states, and counties to those valid for the zip code. For Canadian addresses, this restricts the listing of cities and provinces to those valid for the post code. You can then select this additional address information from short lists.

**Note:** For Canadian addresses, CN (for Canada) always appears in the State field, the province name appears in the County field, and the post code appears in the Zip Code field.

4. If you are unsure of the zip or post code, enter the city name. For US addresses, this restricts the lists of states, counties and zip codes to those valid for the city. For

Canadian addresses, this restricts the lists of provinces and post codes to those valid for the city. You can then select this additional address information from short lists.

**Note:** Use the Phone Numbers window instead of this window to record telephone numbers otherwise you will be maintaining two lists of numbers.

See: Adding Telephone Information, page 2-76

5. Select an address type, such as home, or weekend, or business. You can only have one address of each type at any time.
6. Check the Primary checkbox to identify the person's main address. Otherwise, leave blank. By default, the first address you enter is the Primary address.

Only one address at any time can be a person's Primary address.

7. If you know the last date this address will be effective for the person, enter it in the Date To field.
8. Save your work.

### Updating Addresses

Use the Address window.

#### To update the primary address:

1. Enter an end date for the existing primary address.  
Do not save.
2. Create the new primary address starting the next day and check the Primary checkbox.

**Note:** An employee must always have a primary address, but you cannot enter more than one primary address for the same time period.

3. Save the new primary address.

## Adding Telephone Information (Phone Numbers Window)

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

**Note:** You cannot enter or update telephone information in the Phone Numbers window for a contact who is also an employee or contingent worker. Instead, update the relevant employee or contingent worker record.

#### To enter a telephone number:

1. In the Type field, select the type of the telephone device. For example, Office, Home or Fax.
2. In the Phone Number field, enter the telephone number. You can use any format for the telephone number unless specific instructions are listed below for your legislation.

**US Users:** You must enter telephone numbers in one of the following formats to ensure they are included correctly on the US Magnetic Reports (for example, the State Quartely Wage Listing).

- 222-333-4444X55
- 222-333-4444Ext555
- 222-333-4444-555

Any format is allowed.

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

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

**Note:** You can only have one active record for numbers with the types Home or Work. To add a new record for these types you must end date the existing record and begin a new record on the following day.

## Entering Communication Delivery Methods

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

### To enter a communication delivery method for a person:

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

## Entering Next of Kin and Other Contacts

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

- People to contact in an emergency.
- Dependents.
- Beneficiaries of benefits such as insurance policies or stock purchase plans.

- Individuals receiving payment of a wage attachment/third party payment deducted from the employee's salary.

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

The coverage start date for an employee contact, is the employee hire date or the contact relationship start date, whichever is later. This can be important in benefits processing, where eligibility for certain benefits starts from the start date of a contact relationship.

### **Creating The Same Contact Relationship More Than Once**

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

### **Updating a Contact Relationship Start Date to Make it Earlier**

You can update the contact relationship start date between two people, creating a supplementary record to cover the additional period.

For example, Person A exists on the application as an employee with a hire date of 01-Apr-1990. Person B exists on the application as a contact, with a creation date of 01-Jun-1990. Person A then marries Person B on 01-May-1990. As the application holds a contact coverage start date of 01-Jun-1990, a new contact record is entered to cover 01-May-1990 and 31-May-1990.

### **To enter a contact:**

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

**Important:** For UAE users only, also enter the father, grandfather, and family name.
  - Select the user person type.
 

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

### **To enter contact relationships:**

1. Select the contact relationship, for example child or spouse.
2. Enter the start and end date (if known) of the relationship.

**Note:** For Dutch users only, if you set up a spouse as a contact for an employee, whose full name format includes partner's prefix



and surname, the full name of the employee changes automatically based on the spouse's name, if the contact relationship covers the employee's full period of employment. If it does not cover the full period the changes to the full name of the employee must be set manually on all datetrack records.

3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end reason for the relationship.

4. Select whether the contact:

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

This enables you to select this person on the Personal Payment Method window when entering a third party payment method for the employee.

- Shares the same residence as the employee.
  - Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependent and/or beneficiary.
  - Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.
5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

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

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

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

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

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

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

Furthermore, if you update a relationship that has had a mirror relationship automatically created, the mirror is also updated accordingly. For example, if

you end date the relationship of spouse for person A, the spouse relationship for person B is also ended. If the relationship type is changed the relationships become independent.

7. Enter further information about the contact if your localization team has setup the configuration of the further information field.

**For Spanish users only:** Record if the contact (disabled dependant or a dependant) is financially dependent on the employee. The application uses this information to calculate the tax reductions the employee may be eligible for. You can also record if the employee is a single parent as this affects the employee's the tax-withholding rate.

**For Russian users only:** If the contact type is child, indicate whether the child is in full-time education. The application uses this information to calculate the employee's tax reductions. You must also record any disability information for the child contact, as this affects an employee's social security contributions, tax, and leave benefits.

See: Entering Disability Information, *Oracle HRMS Enterprise and Workforce Management Guide*

8. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

### **What Next?**

If you want to enter addresses or phones for the contact, choose the Contact Details button.

# Using People Management Templates

## Folders for Saved Search Criteria or Results

You can save a query or the results from a query to folders so that you can quickly access the people you need to work with in future work sessions. The Find window in a template form enables you to do this. The folders are added to the Data Organizer on the Summary window. You can view the people in the Data Organizer by opening the correct folder. There are two types of folder you can use.

### Search Criteria Folder

This type of folder contains the search criteria for your query, such as "find all employees assigned to the Northern Sales organization". The actual results are not saved in the folder. This type of folder is dynamic because each time you open it, the query is performed again. So you always get the most up-to-date results displayed in the folder.

You can save folders into the Personal Folders branch and they will appear on the Data Organizer when you open the Summary window. You can also make these folders public so that other users can access them.

### Group Folder

When you perform a query using the Find window and the results are returned, you can save that set of results or a selection of the results in a group folder. When you open that folder in future, you will always see the same set of people even though some of the people may not meet the original search criteria when you look at the folder again.

You can build upon lists of people in group folders by copying and pasting people from one folder into another. For example, suppose you have two group folders containing a fixed list of people you regularly work with. You could cut the people from one folder and paste them into the other folder leaving you with just one folder to open. You can delete folders so you could remove the empty one.

**Note:** You cannot make group folders public.

See: Saving Search Criteria or Search Results to a Folder, page 2-91.

## Template Windows User Interface

The topics in this section describe how to use the people management templates to process workforce information for contingent workers and employees. US Federal HR specialists can use people management templates to process contingent worker information. For employee appointments and other employee-related actions, use the Request for Personnel Action functionality. workers. See: Request for Personnel Action Overview, page 3-1.

The following is an introduction to the windows that have been created from the example predefined templates. If you have been using the standard Oracle HRMS windows such as the People window, there are additional features that you need to be aware of:

- Configurable Find window
- Configurable Summary and Maintenance windows

- Graphical navigator
- Checklist tab
- Graphical timeline bar
- Actions button and Notify button

## Find Window

The Find window enables you to perform detailed queries to find a person or group of people you need to work with. You can enter queries using basic search criteria such as name. You can also use advanced criteria such as grade ranges, or combinations of criteria (for example Job is Sales Manager AND Organization is not Northern Sales).

The Find window expands to display the results of the find when you choose the Find button.

To edit a person's details, select the record and choose the Show Details button. You can save the query, results, or a selection of the results into folders so that you can access those people again without performing the search again. See: Saving Search Criteria or Search Results to a Folder, page 2-91 for more information.

The Effective Date field must contain a value. This date controls which values are displayed in lists of values. It can differ from the date set in the calendar. However, when you choose the Find button, the effective date is set to what was entered in the Find window. If you do not enter a date, the current effective date from the calendar is used.

**Important:** The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

See: Finding a Person or Group of People, page 2-85.

## Summary Window

The Summary window enables you to browse and select records from the database using the Data Organizer, which is the navigator on the left hand side of the window. You can select a Person, Assignment, or Application in the Data Organizer to see a summary of information in the Details region. This window only enables you to make changes to the checklist information on the Checklist tab. You cannot edit a person's details using this window.

## Data Organizer

There are three root nodes in the Data Organizer:

- People By Name (or People by Job, or People by Organization depending on what is selected in the View By poplist).
- Personal Folders, which you have created for your own use only.
- Public Folders, which have been created from the Find window and made public for everyone to see

## People By Name, Job or Organization

By expanding People by Name, you can see folders in alphabetical order containing all the people in your security profile. You can order the information in this branch by name, job, or organization.

## Personal Folders

There are two types of Personal folders:

- Search Criteria

Search Criteria folders contain a query. They are dynamic. When you open the folder, the query is performed. This saves you re-entering commonly used queries in the Find window each time you need to use them.

- Group

Group folders are static. They contain the groups of people you most commonly need to work with. You can create a Group folder by saving search results or pasting people in from other folders. People in a Group folder are sorted by name.

See: Saving Search Criteria or Search Results to a Folders, page 2-91

See: Managing Your Group Folders, page 2-86.

## Public Folders

Public folders are Search Criteria folders that have been made available to all users.

## Checklist Tab

The Summary and Maintenance windows can contain a Checklist tab. This contains checklist items set up by your system administrator to enable you to record the progress of tasks. For example, there might be a check to record that a job offer has been issued, along with a status and date.

**Important:** The checklist is only a visual reference and does not perform any actions.

## Actions Button

The Actions button on the Summary and Maintenance window enables you to perform tasks such as Activate Assignment or Hire Into Job.

The list of actions available depends upon the person type and their assignment status. For example, if you select an employee (not their assignment), the actions available are:

- Apply for Internal Vacancy
- New Assignment

If you select a contingent worker (not their assignment), an available action is:

- New Contingent Worker Assignment

If you select an employee or contingent worker assignment, available actions include:

- Make Primary Assignment
- Activate Assignment
- Suspend Assignment

If you select a secondary employee assignment, additional actions are available:

- Terminate Secondary Employee Assignment
- End Secondary Employee Assignment

### Notify Button

The Notify button on the Summary and Maintenance windows enables you to send workflow notifications to other people. For example, when hiring a new person, you might need to send notifications to security to organize a new security card and to inform the system administrator to set up a new account. You select the notification message and the person or role to send it to. You can preview the notification before you send it.

The notification emails are displayed in the Workflow Notification Mailer. See Oracle Workflow for more information.

### Creating New Records

If you select People By Name, Job or Organization, you can also create new records. For example, you can create a new employee or new applicant depending on how the template restrictions have been set up. You can choose New from the toolbar or from the right mouse menu.

## Maintenance Window

The Maintenance window enables you to enter and update information. The Maintenance window can contain tabbed regions each holding logical groups of information. Choose a tab to view the information in it. This window also contains a timeline bar that you can use to navigate to specific points in time such as a future date or the date of the last change to a record.

### Correction or Update

The template window makes datetracked changes on a day-to-day basis in the same way as other datetracked windows. You can make datetracked changes to any of the fields on the window by using the option buttons to choose whether to update or correct information.

- If you choose *Correction*, Oracle HRMS overwrites the existing information.
- If you choose *Update*, Oracle HRMS records the date and change, and retains the original information.

If you are trying to update the record and the system will only let you make a correction, check whether your effective date is the date of the last change. You cannot record two updates for one day, so the system forces you to correct the last update.

**Important:** This interface only enables you to update or correct the latest information about a person or assignment. If there is a future change (after your effective date) to any personal information, all personal information fields are greyed out. Similarly, if there is a future change to any assignment information, all assignment fields are greyed out. To make complex retroactive changes to history, you must use the People and Assignment windows, where all the DateTrack modes are available for corrections.

## Using the Timeline Bar

The Maintenance window contains a graphical timeline bar. The timeline is color coded to help you see when changes happened. You can move to a new date either by scrolling forwards or backwards using the arrow buttons or by entering a date and choosing the Go button. You can also click in the DateTrack timeline to move forwards or backwards in time.

You can choose to view specific changes on the timeline by choosing from the poplist next to the timeline bar. For example, you can choose to view changes only for Last name. You can then use the arrow buttons to navigate to the first, previous, next, or last change made to this field.

**Note:** The fields listed in the poplist are defined by your system administrator in the template.

There can be a number of types of information included in the Maintenance window, depending on the template design, for example, personal information, assignment information, tax information. These types may have been updated at different times, so the date of the last update can vary depending on the type of information.

If a field is listed in the poplist next to the timeline bar, you can also view its DateTrack history by right-clicking on the field and choosing DateTrack History.

## Accessing More Field Information Using the Right Mouse Menu

Your system administrator may have enabled the display of more information for some fields. For example, on the Job field you might be able to display the normal working conditions. To view this information, right-click in the field and choose the appropriate option from the right mouse menu.

## Finding a Person or Group of People

If the Find window is not automatically displayed when you navigate to a template window, choose Find from the toolbar or from the View menu.

**Note:** You may have a template in which there is no Find window, depending on how the people management templates are configured at your site. If the Find option is not available, you must select a person from existing folders in the Data Organizer.

This window enables you to find a person or group of people to work with. The Details tab is displayed by default to enable you to perform a basic query. For more complex queries, you can choose the Advanced tab.

### To find a person or group of people:

1. In the Basic tab, enter the search criteria you want to query on. For example, enter the person's last name to find a person or enter a job title to find a group of people assigned to, or applying for, that job.

You can enter values in as many fields as you require. The search finds people who meet all the criteria you enter.

**Note:** The Effective Date determines the lists of values available on fields in the Find window and which records will be returned. The date you set here also sets the calendar date when you choose the

Find button. So if you navigate to another window, the date is carried over to that window. If no effective date is displayed, the Find window uses the calendar date, which you can see by clicking the Calendar icon on the toolbar.

2. Optionally, choose the Advanced tab and enter more search criteria.

For example, to find a person based on their grade, enter Grade is greater than on one line and Grade is less than on a second line. This restricts the query to a grade range.

3. Choose the Find button.

If you have entered search criteria in both the Details and Advanced tabs, the search finds people who meet both sets of criteria. For example, if you entered Northern Sales in the Organization field of the Details tab and a grade range in the Advanced tab, the search finds people assigned to the Northern Sales organization within that grade range.

The window expands to display your search results. The results are displayed in a folder so you can use the tools in the Folder menu to rearrange the columns, widen fields, and so on.

**Note:** Choose the Clear button to clear all fields if you want to enter new search criteria.

4. To edit a person's details, select the row and choose Show Details.

**Important:** The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

5. Optionally, you can save the query, the results, or a selection of the results to a folder, which you can use again See: Saving a Query or its Results to a Folder, page 2-91.

## Managing Your Group Folders

You can copy people from any folder and paste them into Group folders. You can also remove people from your Group folders. You do this using the Data Organizer in the Summary window with the Cut, Copy, and Paste commands.

### To cut or copy and paste people in folders:

1. In the Data Organizer, open the folder from which you want to copy or cut people.
2. Select the person or people you want to copy or cut.
3. Choose Copy or Cut from the Edit menu, toolbar, or right mouse menu.
4. If you are adding the person or people to another folder, select the group folder in which you want to paste them.
5. Choose Paste from the Edit menu, toolbar, or right mouse menu.



**Note:** To delete a group folder, see: Deleting a Folder, page 2-92.

## Entering Contingent Worker Information

To enter information about a new contingent worker, use the Enter Contingent Workers template. When you enter a new contingent worker, the application automatically creates a default assignment for that contingent worker.

### To enter a new contingent worker:

1. Complete the name and address fields.
2. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments:
  1. Select a purchase order for this assignment.
  2. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line.
  3. Information from the purchase order and purchase order line appears automatically in the Supplier Name, Supplier Site, Projected Assignment End, and Job fields.

If you do not use Oracle Services Procurement, complete the supplier fields and the Projected Assignment End field.

3. Complete the work structures and working hours fields.
4. If you use Oracle Services Procurement, information from the purchase order line appears automatically in the Rate Basis, Rate Type, Currency, and Value fields. Otherwise:
  1. Select an Assignment Rate value. The rate basis and rate type values appear automatically. See Entering Assignment Rates for Contingent Worker Assignments, page 2-51
  2. Select a currency and enter a monetary value for the assignment rate.
5. Select Correction or Update.
6. Save your work.

## Maintaining Contingent Worker Information

Use the Maintain Contingent Workers template.

### To update contingent worker information:

1. Select the relevant contingent worker and choose the Show Details button.
2. Choose the Personal tab to enter or update the contingent worker's name.
3. Choose the Communication tab to enter or update home or work contact details.
4. Choose the Assignment tab to enter or update information about the worker's supplier, assignment, or work structures.

**Note:** If you use Oracle Services Procurement to provide purchase order information, you cannot alter assignment or supplier information obtained from the purchase order or purchase order

line. However, you can select a different purchase order or purchase order line.

5. Choose the Schedule tab to update the working hours information.
6. To end the placement, choose the End Placement button.
7. Select Correction or Update.
8. Save your work.

## Activating an Assignment

You can activate an assignment using the Maintain Employee windows. For example, you may want to active an employee's assignment after an employee returns from maternity leave. The Active Assignment status means that the employee is working in accordance with his or her usual working conditions.

There are two methods you can use to activate an assignment.

### **To activate an assignment in the Summary window:**

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to activate. Expand the node until the assignment you want to activate is displayed. Select the assignment.
2. Set the effective date to the date upon which you want to activate the assignment.
3. Choose the Actions button.
4. Select Activate Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

### **To activate an assignment in the Maintain window:**

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to activate. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to activate the assignment.
3. Choose the Assignment tab and select the assignment you want to activate from the drop-down list.
4. Choose the Actions button.
5. Select Activate Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

## Suspending an Assignment

You can suspend an assignment using the Maintain Employee windows. For example, you may want to suspend an employee's assignment while they are on maternity leave

There are two methods you can use to suspend an assignment.

**To suspend an assignment in the Summary window:**

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to suspend. Expand the node until the assignment you want to suspend is displayed. Select the assignment
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Actions button.
4. Select Suspend Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

**To suspend an assignment in the Maintain window:**

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to suspend. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Assignment tab and select the assignment you want to suspend from the drop-down list.
4. Choose the Actions button.
5. Select Suspend Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

## Checking for Duplicate People

If you enter a person in the Hiring Applicants or the Maintain Employee windows, with the same first and last name as a person who already exists on the system, a caution message will be displayed if you have the HR: Cross Business Groups profile option set to No. If you have specified a date of birth, the caution will only be displayed if another record with the same date of birth, or no date of birth exists. If you want to see more details about the existing records use the Find Duplicate button.

**Note:** The caution message is displayed if there are any people with the same name throughout the system, however, the Find Duplicate button only enables you to access the details of people for whom you have security access.

If you have the HR: Cross Business Groups profile option set to Yes, then when you save a person who already exists on your application, either in your business group, or in a different one, a list of values is displayed showing the potential duplicates. You can either select one of the records shown to link the records together to show they are the same person, or cancel the save and use the Find Duplicates button to see more details if any of the records are in your business group.

**To check for duplicate people:**

1. Enter the new person or make any required changes in the Maintain window.
2. Choose the Find Duplicate button. The system now runs a query on all the people with the same first and last name, and date of birth if specified in the Maintain window, as the person you were editing, based on your security access, and displays the results in the Find window.
3. If you want to see details of any of the people retrieved in the query, select the record and choose the Details button. You will be prompted to save any changes that are pending.

**Note:** If you select not to save the changes, you will lose any data entered for that person. If you are entering a new person it is recommended that you do not save the changes until you have investigated any possible duplications.

The details of the person selected in the Find window are now displayed in the Maintain window.

**Note:** If the Security check box is not checked on the Find window it is possible that you will see records that you are not permitted to retrieve, and hence will not be able to view in the Maintain window.

## **Sending a Workflow Notification**

You can send an email notification to other people or job roles informing them of actions you have completed or actions they need to take. You use the Summary window of the Hiring Applicants form. The notification message is made up of details relating to the person and assignment and is usually completed as part of an action such as hiring a person.

**To send a workflow notification:**

1. Use the Find window to search for the person you are sending the notification about, or select them from the Record navigator in the summary window.
2. Choose the Notification button.

If you select the person node and choose the Notification button, only tokens associated with the person will be used in the message such as Last\_Name. If you select the assignment node, then tokens relating to the assignment details will also be used, such as Job.

3. In the Notification window, choose the message you want to send and the person or role you want to send it to. The messages are set up in Oracle Workflow Builder.
4. Choose Preview to view how the message will appear to the recipient.
5. Choose Send to send the notification message.

## **Entering Visa Related Data**

You can enter a large amount of visa related information, such as passport information, and visit history, using the Maintain Visa windows.

**To update employee information:**

1. In the Summary window, use the Data Organizer to select the employee and choose Show Details.
2. Choose the Visa Administration tab to enter information relating to a person's visa into a number of extra information types. You can enter the following information:
  - Alien Income Forecast
  - Global Work Permit
  - Passport Details
  - Visa Details
  - Visa Payroll Details
  - Visa Residency Details
  - Visa Visit History

See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

3. Choose the Visa Checklist tab to enter scheduled and completed task information relating to visa holders within your enterprise.
4. Choose the Address button to add further addresses, such as the employee's primary home country address.

See: Entering Addresses, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

5. Choose the Contact button to enter details of the person's next of kin and other contacts.

See: Entering Next of Kin and Other Contacts, page 2-77

6. Choose the Notify button to send notification of the visa's expiry to the employee and supervisor.
7. Save your work.

## **Saving Search Criteria or Search Results to a Folder**

When you enter a query in the people management Find window, you can save the query or its results to a folder. The system adds the folder to the Data Organizer on the Summary window. The next time you use the Summary window, you can open the folder to work with the saved list of people (if you saved the query results) or perform the query again (if you saved the query). For more information about the types of folder, see: Folders For Saved Search Criteria or Results, page 2-81.

Perform your find using the Find window before following these steps.

**To save a query to a Search Criteria folder:**

1. Choose the Save As button.

The Save As window is displayed.
2. Make sure Search Criteria is selected.
3. Select a folder in which to create the new folder.

4. Enter a unique name for the folder.
5. Select Public if you want the folder displayed in the Public folders list for other users to see. A folder is also created in your Personal Folders list.
6. Choose Save.

You can see the folder in the Data Organizer when you view the Summary window. Expand Private Folders to see your new folder.

**Note:** If you cannot see your folder on the Summary window, right-click on the Data Organizer and choose Refresh.

#### **To save the results of a query to a Group folder:**

1. In the results list, select the people you want to add to your folder.
2. Choose the Save As button.  
The Save As window is displayed.
3. Make sure Only Selected Results is selected.
4. Select a folder in which to create the new folder.
5. Enter a unique name for the folder.
6. Choose Save.

You can copy people from other folders into Group folders in the Data Organizer. See: Managing Your Group Folders, page 2-86.

## **Deleting a Folder**

You can delete Search Criteria and Group folders from the Data Organizer on the Summary window if you no longer need to use them. You cannot delete Public folders.

#### **To remove a folder from the Data Organizer:**

1. Expand Personal Folders and select the folder. to be deleted.
2. Choose Delete from the Edit menu. You can also right-click and choose Delete from the right mouse menu.  
A folder does not have to be empty before you can delete it.
3. Save your work.

## **Creating a New Group Folder**

You can create a new group folder or subfolder on the Data Organizer of the Summary window. Then you can add people to your new folder by cutting (or copying) and pasting from other folders. See: Managing Your Group Folders, page 2-86.

**Note:** Using the Data Organizer, you can only create new folders in the Personal Folders branch. Use the Find window to create Public folders.

#### **To create a new folder on the Data Organizer:**

1. Select Personal Folders.

2. Select a folder in which to create the new folder.
3. Right-click and choose New Folder.
4. Enter a name for your folder in the New Folder window.
5. Choose OK.
6. Save your work.

# Reporting on the Workforce

## The Workforce Headcount Report Set

The workforce headcount report set includes the Workforce Count Report, the Workforce Count Report (Spread Sheet Version) and the Head Count Detail Report. The reports display headcount information for your organization on a local or world-wide basis for the search parameters you specify.

## The Workforce Count Reports

Both of the workforce count reports enable you to access simple workforce information for all organizations within an organization hierarchy and date range you specify. The difference between the workforce count reports is that the Workforce Count Report (Spread Sheet Version) enables you to open the report in a spreadsheet format. The reports display a breakdown of the information using the following headers:

- Organization
- Rev/Non-Rev
- Start (Total)
- End (Total)
- Net Change
- Hires
- Terminations
- Other (Net)

**Important:** The dates you specify must fall within one version of the Organization Hierarchy on which you are reporting.

The reports display a count of defined worker types, including all types of contingent and temporary workers. The reports also display transition information, for example the number of new hires and terminations.

The reports return a headcount value for the assignment ID based on either the assignment budget value, or the supplied TEMPLATE\_HEAD FastFormula. You can create custom FastFormulas on which to return the headcount values by creating a FastFormula named BUDGET\_HEAD. For more information, see Running the Workforce Count Reports, page 2-100

## The Head Count Detail Report

The Head Count Detail Report enables you to display detailed headcount information for an organization hierarchy. The report displays a breakdown of the information using the following headers:

- Organization
- Division
- Rev/Non-Rev
- Beginning Head Count



- Regular
- Contract
- Temp
- New Hires
- Offers
- Vacant FTE
- Termination
- Ending Headcount
- # Change
- % Change
- Attrition Rates

Three FastFormulas are supplied with the Head Count Detail Report, that are used to control the output of the report. These are:

- HR\_PERSON\_TYPE\_TEMPLATE which maps person types and employment categories to worker types regular, temporary and contract.
- HR\_MOVE\_TYPE\_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for employees.
- HR\_CWK\_MOVE\_TYPE\_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for contingent workers.

If your enterprise has different requirements to those defined in the supplied formulas, then you can create your own FastFormulas to accurately represent the setup of your enterprise. You can define worker type mappings to person type and employment category by creating a FastFormula named HR\_PERSON\_TYPE. Similarly, you can create your own FastFormula to define leaving reasons by creating a FastFormula named HR\_MOVE\_TYPE for your employees and HR\_CWK\_MOVE\_TYPE for your contingent workers. If you define a formula with one of these names, then it overrides the corresponding supplied formula when you run the report. For more information, see: Running the Head Count Detail Report, page 2-99

## New Hire Reporting

New hire reporting is the process of reporting newly hired and rehired employees to a state agency. As an employer, you are required to report on your new hires within a certain number of days after the date of hire.

A primary purpose of new hire reporting is to ensure that individuals who are legally responsible for making child support payments are in fact making these payments by means of pay garnishments. Some states also use new hire reporting to help in detecting abuse of assistance programs such as Workers Compensation and unemployment insurance.

Payroll departments are normally responsible for submitting the new hire reports for the GREs in their enterprise. In most states, they must submit these reports within a certain number of days, usually 20 days. However some states have different reporting requirements. Oracle HRMS recommend that you verify the due date with the state to which you are filing the report.

Oracle HRMS enables you to report on your newly hired and rehired employees using the New Hire State Report and the New Hire State Magnetic Media report.

## Single and Multistate Employers

Single state employers, that is, an employer who hires and employs people within one state, are required to report all new hire information to the state in which all its employees work. Multistate employers, that is, an employer who hires and employs people in two or more states, can either report all the newly hired employees to each working state or report all newly hired employees to one state.

A multistate employer who reports its newly hired employees with one state must submit their report using the New Hire State Magnetic Media report. This report uses the selected state's format to produce one report for all new hire information for each state within your GRE. Oracle HRMS recommend you contact the individual state agency to which you are reporting, as some states have different reporting electronic data requirements.

**Note:** If you are a multistate employer who wants to report all new hire information to one state, you must register with the DHHS (Department of Health and Human Services). Refer to the DHHS website for more information about registering with them: [www.acf.hhs.gov](http://www.acf.hhs.gov)

## Data for New Hire Reports

These reports include the following information that is required for reporting your new hires:

- Employee name, address, date of hire and social security number
- Employer name, address and federal identification number (EIN)

**Note:** State agencies require the GRE's federal identification number (issued by the IRS), or its SUI identification number, or both, to be able to identify it. You can enter this information for your GRE in the Organization window.

Additional information may also be included in the report, depending on the requirements of the state to which you are submitting your report. This information includes:

- Employees date of birth.
- Their jobs, hours normally worked per week, full or part time employment category, salaries, rates and pay frequency.
- The availability to the employees, and their dependents, of employer-provided health care insurance plans.
- Whether employees currently have child support obligations.
- Employer MD UI number

New Hire reports must also include the name, job and telephone number of the employee serving as the GRE's contact for new hire reporting.

## Running the Full Personal Details Report Set

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

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

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

You run report sets from the Submit Request Set window.

### To run the Full Personal Details report set:

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

## Running the Employee Summary Report

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

Run reports from the Submit Requests window.

### To run the Employee Summary Report:

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

## Running the Worker Organization Movements Report

The Worker Organization Movements Report shows worker movements into and out of a particular organization or organization hierarchy. Worker movements include

new starters, terminations, transfers in, and transfers out for employees, contingent workers, or both.

Run the Worker Organization Movements Report from the Submit Requests window.

**To run the Worker Organization Movements Report:**

1. In the Name field, select Worker Organization Movements Report.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Specify the organization as follows:
  - To see information for a whole organization hierarchy, select its name and version in the Organization Structure and Version fields. Leave the Parent Organization field blank.
  - To see information for one organization, select its name in the Parent Organization field. Leave the Organization Structure and Version fields blank.
  - To see information for an organization and its subordinates in a particular hierarchy, select the name of the organization in the Parent Organization field, and the name and version of the organization hierarchy to which it belongs in the Organization Structure and Version fields.
4. Specify the period for which you want to see the information.
5. In the Worker Type field, specify whether the report should include employees, contingent workers, or both.
6. In the Worker Detail field, select:
  - Summary Only, to see only the totals for each type of movement
  - Assignment Number, to see a list of worker movements in order of assignment number
  - Worker Name, to see a list of worker movements in order of worker name
7. Choose the Submit button.

## Running the Assignment Status Report

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

Run reports from the Submit Requests window.

**To run the Assignment Status Report:**

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

If the effective date lies between the version's start and end dates, the report is effective as of this date. If it lies outside these dates, the report is effective as of the start date of the version you select.

6. Leave the Parent Organization field blank to see information about all organizations. Select a name in this field to see information on all subordinate organizations in the hierarchy.

**Note:** You must enter a value in this field if you have entered a value in the Organization Structure field, and you must leave this field blank if you left that field blank.

7. Make entries in the Group, Job, Position, Grade and Payroll fields as required.

If you leave all segments of the Group flexfield blank, you see information about employees in any groups. If you leave one segment blank you see employees with any value for that segment.

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

## Running the Head Count Detail Report

You run the Head Count Detail Report from the Submit Request window.

If the dates you enter in the Date From and Date To fields fall within one version of the organization hierarchy you define, only one page of results is returned. If, for example, the dates span more than one version of the organization hierarchy, one page of results will be returned for each version.

### To run the Head Count Detail Report:

1. In the Name field, select Head Count Detail Report.
2. Enter the Parameters field to open the Parameters window.
3. Set the date from which the report begins the search.
4. Set the date up until which the report searches.
5. Select the organization hierarchy on which you want to report.
6. Enter the top organization.
7. Select the type of worker which you want to report. For example, you can choose to report on employees, contingent workers, or both.
8. Select the roll up. If yes, all organization values will be rolled up to the parent organization.
9. Select the budget type for the report.
10. Select Yes, if you want to include the top organization entered at step 6.

If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.

11. Select the assignment type to include in the report.
12. Enter the reporting period in the Days Prior to End Date field. The number of days you enter determines how many days the report covers, prior to the end date of the organization hierarchy version you specify in step 4.
13. Choose the OK button.
14. Choose the Submit button to run the report.

The report displays the results for the criteria you entered.

## Running the Workforce Count Reports

You run the Workforce Count Report and the Workforce Count Report (Spread Sheet Version) from the Submit Request window.

### To run the workforce count reports:

1. In the Name field, select either the Workforce Count Report or the Workforce Count Report (Spread Sheet Version). Choose the spreadsheet version if you want to open the report in a spreadsheet format.
2. Enter the Parameters field to open the Parameters window.
3. Set the date from which the report begins to search.
4. Set the date until which the report searches.

**Note:** The Start Date and End Date you specify must fall within one version of the organization hierarchy on which you want to report.

5. Select the organization hierarchy on which you want to report.
6. Enter the top organization.
7. Select the roll up. If yes, all organization values will be rolled up to the parent organization.
8. Select the budget type for the report.
9. Select yes, if you want to include the top organization entered at step 6.

If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.

10. Select the assignment type to include in the report.
11. Choose the OK button.
12. Choose the Submit button to run the report.

The reports display headcount information for the parent organization and all the organizations below it in the organization hierarchy. You can choose to run the Workforce Count Report for an entire hierarchy, or from a selected parent organization within the hierarchy.

## Running the Duplicate Person Report

If you are upgrading from a release prior to the PER G Minipack, then, as part of your upgrade to support the global person functionality, an entry for every person record in HRMS is made in the TCA.

See: The Person Record, page 2-4 for more information on how the HRMS and TCA schemas link together.

If your enterprise has multiple business groups and you have international employees, then you may find that after this upgrade you end up with multiple TCA party records for the same person. For example if a person has transferred from one business group to another.

In order to identify potential duplicate records you run the Duplicate Person report in the Submit Requests window.

### To run the Duplicate Person report:

1. Select the Duplicate Person report in the name field.
2. Click in the Parameters field to display the Parameters window, if it does not automatically open.
3. Enter the date upon which you want to run the report. The default is the current system date.
4. Select a person for whom to run the report or leave blank to run for all people in your business groups who are also in another business group.
5. Choose OK to run the report. You can view the results from the Requests window.

### What Next?

Functionality planned for a future release will enable you to merge records that relate to the same person. See Metalink or contact Oracle Worldwide Support for further details.

## Running the Full Person Details Report

The Full Person Details Report provides you with accurate information about an employee's history. The report features all periods of service and changes in employment history. Employee's can request the report on an ad-hoc basis.

Run reports from the Submit Request window.

### To run the Full Person Details Report:

1. In the Name field, select Full Person Details Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter an effective date.
4. Select the employee to be reported on.
5. Choose the Submit button.

## Running the Person Full History Report

Use this report to see the personal and professional details of employees and contingent workers in your enterprise. You can include an employee's applicant history and details

about the current assignment such as absence, contact, and salary information in the report. You can also see the details of multiple assignments, if any, for the employee or contingent worker.

This report highlights any information that has changed over a period of time. If your enterprise uses element sets to group together similar elements, then you can select to include only those elements from a particular set.

For contingent workers, you can see supplier details such as supplier site, purchase order number, and purchase order line, details about the periods of placement and assignment rates. You cannot view the absence and termination details for contingent workers.

Run the Person Full History Report from the Submit Request window.

### **To run the Person Full History Report:**

1. In the Name field, select the Person Full History Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the person for whom you want to see the details.
4. Select Yes to include the details held in descriptive and key flexfields attached to a person, such as job, position, and assignment. If the flexfield structure is not defined or contains no values, you do not see these details in the report.
5. Select the element set to restrict the information to a specific group of elements. If you do not select any element set, all elements present in the employee's element entries are listed. For example, if the compensation element set includes details about salary, bonus, and stock options, you can view these details for the employee.
6. Select Yes in the appropriate fields to include the following details:
  - Employee's applicant record for the current assignment
  - Employee's assignments, absences, and terminations, and contingent worker's assignments
  - Employee's salary and contingent worker's assignment rates
  - Contacts, addresses and phone numbers for employees and contingent workers
  - Employee's ethnic origin, nationality, and disability statusOtherwise select No. If you enter No, or if there are no records for that parameter, you do not see the individual records in the report.
7. Choose the Submit button.

## **Using the People Folders**

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

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



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

**To produce lists of assignments:**

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

For further information about Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Listing Assignments Using the Assignments Folder

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

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

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

The system administrator can also link this window in a task flow so that you use it to access other windows of employment information. Notice that if you select a past assignment in the folder, you cannot open other windows of employment information.

**To produce lists of assignments using the assignment folder:**

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

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

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

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Listing Assignments Using the List Assignments Window

In this window, you can view *current* employees and applicants. To view former employees or applicants (or both current and former), see: Using the List People By Assignments Window, page 2-104

### To produce lists of assignments:

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

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

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

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Using the List People by Assignment Window

In this window you can choose whether to view current or former employees, applicants, or contingent workers. However, you must search on a whole Job, Position, or Grade name, not on segments of these flexfields. To search on segments of the flexfields, use the List Assignments window, see: Listing Assignments Using the List Assignments Window, page 2-104

### To produce lists of assignments:

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

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

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Listing Workforce by Position

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

- List Workforce by Position

- List Workforce by Position Hierarchy

### List Workforce by Position Window

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

#### To view worker names by position:

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

The folder displays the positions that match your selection criteria, together with the holder's name employee, or contingent worker number and worker type. The worker type is similar to the person type, except that the worker type only displays the person's active worker type. For example, the person type of *Employee.ex-applicant* displays as *Employee*.

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

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

### List Workforce by Position Hierarchy Window

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

#### To view lists of positions within a position hierarchy:

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

The folder displays all positions below the one you selected in the hierarchy. It also lists the employees and contingent workers who hold these positions as well as their worker type. The worker type is similar to the person type, except the worker type only displays the person's active worker type. For example, the person type of *Employee.ex-applicant* displays as *Employee*.

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

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

For further information about Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Listing Workforce by Organization

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

### To list workers in several organizations:

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

### To list workers in one organization only:

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

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

#### Manager Field

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

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

#### Type Field

The Type field displays the person type related to the worker identified in the Name field.

#### Organization Field

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

## Listing People by Special Information

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

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

### To list people by special information:

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

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

For more information about using folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Viewing a Worker's Assignment History

Use the Assignment History window to view information about a worker's assignments in both current and previous periods of service and placements. If a worker has been both an employee and a contingent worker, both types of assignment appear in the assignment history.

### To view a worker's assignment history:

1. In the Find Person window, select or enter the worker's full name or number. If you select the worker's name or number from a list, you can limit the list size by selecting a value in the Current field:
  - Yes includes only current workers.
  - No includes only ex-workers.
  - All includes both current and ex-workers.

2. Choose the Find button.

In the Assignment History window:

- This Period shows complete years and months in the current period of service or placement.
- All Periods shows complete years and months in all periods of service and placements.
- Including Breaks shows total elapsed years and months since the worker's initial hire or placement start date.

By default, Assignment History displays one row of information about each assignment in the current period of service or placement.

3. To display assignments from previous periods of service or placements, click in the Work History Start Date or End Date field and press the Down Arrow key. As the dates for previous periods of service or placements appear, related assignments appear in the Assignment History box. Use the Up Arrow key to reverse the display.

## Setting up New Hire Reporting

You must set up the following information for the New Hire State Report and the New Hire State Magnetic Media report.

### To set up for New Hire reporting:

1. Ensure that a federal identification number (EIN) and a SUI identification number, if appropriate, is on record for each GRE that submits new hire reports.

See GREs: Entering the IRS Identification Number, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Enter new hire reporting information for a GRE.

See: Entering New Hire Report Information for a GRE, *Oracle HRMS Enterprise and Workforce Management Guide*

3. When hiring or rehiring employees, indicate whether they
  - are to be included in or excluded from new hire reporting
  - have a legal obligation to pay child support.

See: Entering New Hire Report Information for Employees, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

4. Ensure that the employees you want to include in the report have the following:
  - A primary assignment.
  - A location for the assignment.
  - A GRE for the assignment.

5. Run the new hire reports:

See: Running the New Hire State Report, page 2-108

See: Running the New Hire State Magnetic Media Report, page 2-109

## Running the New Hire State Report

You run the New Hire State Report to produce information on all your newly hired and rehired employees. You can print and submit the new hire information to the state in which your employees work.

Run the New Hire State Report from the Submit Request window.

### To run the New Hire State Report:

1. Select New Hire State Report in the Name field. If the Parameters window does not open automatically, click in the Parameters field.
2. Select the date you want the report to run on in the As of Date field. This date defaults to the effective date, however you can change it.
3. Select the GRE and state for which to produce the report.
4. For Iowa and Texas, enter Yes in the Dependent Health Insurance field if the employer offers health care insurance coverage to employees' dependents. Enter No if coverage is not available to dependents.
5. For Iowa and Texas, if health care insurance is available to dependents, enter in the Waiting Period field the number of days after the employee's hire date that dependents must wait before obtaining coverage. This field defaults to zero.
6. Choose the Submit button.

## Running the New Hire State Magnetic Media Report

You can submit your new hire reports electronically to one of the following states: CA, FL, IL, NY, or TX, using the New Hire State Magnetic Media report. The report produces employer, new hire employee and total number information that you can submit to the reporting state.

If you are a multistate employer from one of the above states, you can choose one state to which to submit your new hire reports.

You run the New Hire State Magnetic Media report from the Submit Request window.

### To run the New Hire State Magnetic Media report:

1. Select New Hire State Magnetic Media in the Name field. If the Parameters window does not open automatically, click in the Parameters field.
2. Select the date on which you want the report to run in the As of Date field. This date defaults to the effective date, however you can change it.
3. Select the GRE and state for which you want to produce the report.
4. Select whether you want to produce an audit report.

The audit report produces two files, the .a01 and the .a03, that you can view with a spreadsheet application. The .a01 file includes information on the employer and the total number of new hires for each state. The .a03 file includes basic employee information, such as, name and address. You can use these reports to view the information that is contained in the file to be submitted to the state agency.

The audit files that you produce are prefixed with the name of the magnetic file. For example, if the selected state is Texas, the audit report would produce the following two files: TXW4.a01 and TXW4.a03.

5. If you choose Florida as the reporting state and you are a multistate employer, you must select Yes in the Multistate Employer (FL) field.
6. Choose the Submit button.

The file that is created is in the \$APPLCSF/out directory, and has the character set EBCDIC. You can submit this file to the state agency using a diskette format. The file names for each state are:

- CA-4NEWHIRE
- FL- FLW4
- IL-H (first 7 digits of the Federal Identification Number FEIN)
- NY- NEWHIRE.RPT
- TX- TXW4

# Workforce Intelligence Key Concepts for People Management

## Key Concepts for People Management Intelligence

The following concepts enable you to accurately interpret the results of the People Management intelligence reports:

- Workforce Count, page 2-110
- Workforce Gains and Losses, page 2-110
- Enterprise Selection, page 2-110
- Job Categories , page 2-112

### Workforce Count

One of the most powerful features of the People Management reports is that you can define how workforce is counted.

Workforce does not necessarily have to be a count of the number of people in your enterprise; it can instead be a count of the assignments and any budget measurement type you have set up. For example, you can count workforce using the budget measurement types of FTE or Headcount.

Additionally, by writing your own formula, using Oracle FastFormula, or the provided formula, you can instruct the report to count workforce exactly how you want to.

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

### Workforce Gains and Losses

To enable you to investigate the workforce in your enterprise, the reports calculate gains and losses as follows:

- **Gains** are the total workforce that exists in the organization or organizations at the end of a time period, which did not exist at the beginning of the time period.
- **Losses** are the total workforce that exists in an organization or organizations at the beginning of a period, but no longer exists at the end of the period.
- **Total Workforce** is the workforce at the end of the time period.

**Note:** Workforce is counted using active and suspended assignments.

### Enterprise Selection

You can decide which area of your enterprise to report on using the parameters of the reports. There are two different methods of enterprise selection:

- Rollup Organizations
- Rollup Each Organization

**Note:** Only the HTML Organization Workforce report uses the concept of Rollup Each Organization.



## Rollup Organizations

Use the Organization or Top Organization and Hierarchy parameters, together with the Organization Rollup parameter to report on one organization, an organization hierarchy, or a section of an organization hierarchy.

To report on a hierarchy, or a section of a hierarchy, enter the top organization or hierarchy you want to report on in the report parameters. You can then decide whether or not you want to rollup all the subordinate organizations in the hierarchy by entering either Yes or No in the Rollup Organizations parameter.

In some reports you can leave the Organization parameter blank to include all organizations in the hierarchy.

## Rollup Each Organization

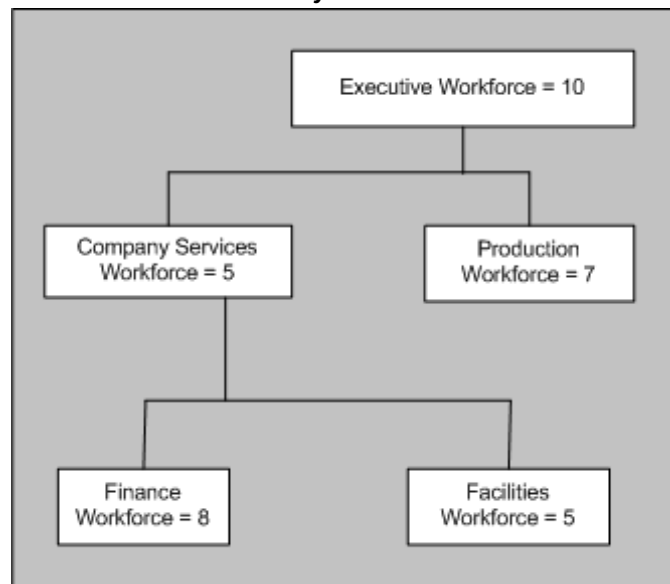
Select the area of your enterprise in the HTML reports by selecting a section of an organization hierarchy. For each report, you only need to enter one organization; all its subordinate organizations are included in the report.

You can then decide to either display information about each organization separately, or rollup information at each level of the hierarchy.

For example, consider the hierarchy for Global Industries shown in the diagram below. To select this section of the hierarchy, you enter Executive in the Organization parameter. The report automatically includes the Company Service, Production, Finance, and Facilities subsidiary organizations.

If you decide not to rollup the workforce count, the report displays each organization independently, and shows the workforce total for only that organization. The workforce total for each organization would be the same as shown in the diagram below. It shows the Executive Workforce of 10 at the top of the organization. Reporting to the Executive Workforce are the Production Workforce of 7, and the Company Services Workforce of 5. Reporting to the Company Services Workforce are the Financial Workforce of 8, and the Facilities Workforce of 5

**Global Industries Hierarchy**



If you decide to rollup each organization, the report will display information that is calculated for that organization and all the organizations below it in the hierarchy.

For Global Industries, the Workforce figures would be shown as in the following table:

Organization	Rolled Up Workforce
Executive (Top Organization)	35
Company Services	18
Finance	8
Facilities	5
Production	7

## Job Categories

The Workforce Summary Analysis, Workforce Ratio, and Workforce Comparison HRMSi reports use job categories to investigate Workforce within your enterprise.

**Note:** You can also analyze how successfully you are recruiting for each job category using the Recruiting and Hiring HRMSi reports.

Oracle HRMS enables you to set up job categories for the different jobs within your enterprise. You can set up categories to classify all your jobs. So you could, for example, set up the job categories of technical, managerial, administration, and so on.

Jobs within your enterprise can fall into more than one category, and HRMS enables you to enter as many categories as you need for a job.

Use the Workforce Ratio report to analyze the percentage of workforce your enterprise has in different job categories. Use the Workforce Comparison report to analyze the absolute levels of workforce.

Both the Workforce Ratio, and the Workforce Comparison reports use assignments to calculate the workforce for each job category. For an assignment to be included it must:

- Be active or suspended.
- Have the job and job category selected.
- Fit the selection criteria entered.

For example: if you report on salaries by grade, the assignment must be for that grade.

If a job category does not have any workforce associated with it, the reports show it as a zero on the table, but do not display it in the bar chart.

Jobs may be assigned to more than one category. For example the job of Software Manager could have the job categories of technical and managerial. If you choose to report on both these categories, reports will display all assignments with the job of Software Manager in both the managerial and technical job categories.

For information on associating jobs with specific job categories, see *Defining A Job, Oracle HRMS Enterprise and Workforce Management Guide*

# Workforce Intelligence for People Management

## Employee Anniversary and Birthday Detail Workbook

This workbook enables you to report on employee anniversaries and birthdays by organization and supervisor hierarchy.

### Worksheets

This workbook has the following worksheets

- Organization Hierarchy
- Supervisor Hierarchy

### Headings and Calculations

The worksheets use the following calculations:

- **Current Service Decimal**

Calculates the employee's length of service in their latest assignment as a number of years.

- **Total Service Decimal**

Calculates the employee's length of service since their first assignment as a number of years.

### Organization Hierarchy Worksheet

The Organization Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by organization. Total and current service calculations are in respect of the system date. The workbook uses the current version of the organization hierarchy.

### Business Questions

*When is the anniversary date of employment of my employees in a given organization hierarchy?*

*When are my employees' birthdays?*

### Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

### Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by supervisor. Total and current service calculations are in respect of the system date. The workbook uses the current version of the supervisor hierarchy.

## Business Questions

*When is the anniversary date of employment of my employees in a given supervisor hierarchy?*

*When are my employees' birthdays?*

## Parameters

You must specify values for the following parameters:

- Supervisor

## Employee by Supervisor Status Workbook

This workbook enables you to report on the supervisor hierarchy and salary details for your employees.

## Key Concepts

See the following topics to accurately interpret this workbook:

Workforce Count, page 2-110

## Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

## Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees, by organization.

The worksheet includes employees who have an assignment on the effective date within the selected organization hierarchy.

## Business Questions

*Who supervises my employees in a given organization?*

*How many direct reports do my employees in a given organization have and what are the total salaries of those direct reports?*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

## Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees by supervisor.

The worksheet includes employees who have an assignment on the effective date, and report directly to the selected supervisor.

### **Business Questions**

*Who supervises my employees?*

*How many direct reports do my employees have and what are the total salaries of those direct reports?*

### **Parameters**

You must specify values for the following parameters:

- Supervisor
- Effective Date

## **Employee Composition Analysis Workbook**

The Workforce Composition Analysis workbook investigates employee composition by assignment details, salary band, and time service band.

It enables you to:

- Compare employee assignment details across organizations.
- Analyze salary information across organizations.
- Change salary groupings.
- Report on salary and time in service bands.

### **Workbooks**

This workbook has the following worksheets:

- By Assignment Details
- By Salary Band
- By Time In Service Band

### **By Assignment Details Worksheet**

This worksheet enables you to analyze employee assignment details by organization, job, position, or grade.

### **Business Questions**

*What is the composition of my workforce by assignment?*

### **Parameters**

This worksheet has no parameters.

### **By Salary Band Worksheet**

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

## Business Questions

*What is the composition of my employees by salary band?*

## Parameters

This worksheet has no parameters.

## By Time In Service Band Worksheet

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

## Business Questions

*What is the composition of my employees by service band?*

## Parameters

This worksheet has no parameters.

## Headings and Calculations

This worksheet uses the following calculations:

- **Service Band**

Populates the Service Band page item in the worksheet. This calculation creates the service bands.

## Employee Hired or Terminated Detail Workbook

This workbook enables you to report on employees who terminated or were hired within two specified dates.

Basic employee primary assignment details are shown, including:

- Hire date
- Termination date
- Termination reason where applicable

## Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

## Organization Hierarchy Worksheet

This worksheet enables you to report on employees who terminated or were hired within two specified dates for a given organization and its subordinate organizations.

## Business Questions

*Provide me with a list of employees who have been hired into or who have separated from a given organization hierarchy.*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

## Related Topics

Workforce Count, page 2-110

## Employee Mailing Address (United States Specific) Detail Workbook

This workbook enables you to report on employee current primary addresses in a United States legislation specific address format.

## Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

## Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given organization and its subordinate organizations.

## Business Questions

*Show me the primary addresses for all employees within a specific organization hierarchy.*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

## Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given supervisor and their subordinates.

## Business Questions

*Show me the primary address of each employee reporting directly or indirectly to a specific supervisor.*

## Parameters

You must specify values for the following parameters:

- Supervisor

## Employee Organization Transfer Detail Workbook

This workbook enables you to report on employee primary assignment organization transfers during a given period. The workbook output includes the employee primary assignment details before and after the transfer, including:

- Job Name
- Organization Name
- Supervisor Name

The workbook also shows the movement type (Organization Movement within Hierarchy, Organization Movement out of Hierarchy, Organization Movement into Hierarchy) for each employee transfer.

## Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

## Organization Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given organization and its subordinate organizations.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

## Business Questions

*Who has transferred into or out of my organization hierarchy?*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

## Supervisor Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given supervisor and their subordinates.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.



## Business Questions

*Who has transferred into or out of my supervisor hierarchy?*

## Parameters

You must specify values for the following parameters:

- Supervisor
- Start Date
- End Date

## Employee Primary Assignment Detail Workbook

This workbook enables you to report on basic employee details by employee primary assignment.

The workbook output is grouped by location. Employee primary assignment count totals are shown for each location

## Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

## Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

## Business Questions

*Show me the primary assignment details for each employee within a specific organization hierarchy.*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Location

## Supervisor Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

The Supervisor Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for a given supervisor and their subordinates.

### **Business Questions**

*Show me the primary assignment details for each employee reporting directly or indirectly to a specific supervisor.*

### **Parameters**

You must specify values for the following parameters:

- Supervisor
- Effective Date
- Location

## **Employee Termination Detail Workbook**

This workbook enables you to report on employees that have separated within a specified time period.

The workbook displays details of all terminated employees, including their basic primary assignment details at the time of termination, including:

- Employee Name
- Employee Number
- Organization
- Job
- Grade
- Position
- Location
- Supervisor
- Working Hours
- Termination date
- Termination reason

### **Worksheets**

This workbook has the following worksheet:

- Organization Hierarchy

## **Organization Hierarchy Worksheet**

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

## Business Questions

*Who has separated from my organization hierarchy and why?*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date
- Budget Measurement Type

## Related Topics

Workforce Count, page 2-110

## Employee Termination with Comments Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook only displays terminated employees who have a salary. The workbook shows the primary assignment details at the time of employee termination, including:

- Employee Name
- Employee Number
- Organization
- Job
- Grade
- Position
- Location
- Supervisor
- Working Hours
- Salary
- Termination date
- Termination comments
- Termination reason

## Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

## Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

### Business Questions

*Who has separated from my organization hierarchy and why?*

### Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date
- Budget Measurement Type

### Related Topics

Workforce Count, page 2-110

## Human Resource Setup Analysis Workbook

This workbook investigates specific information about your Human Resources system. The workbook enables you to:

- Analyze trends in terminations by ethnic origin
- View basic employee information
- Analyze temporary employee information
- View employee assignment information
- Report on organization hierarchy

### Worksheets

This workbook has the following worksheets:

- Terminations with EEO
- Anniversary Birthdays
- HR Temp List with Tenure
- Employee Home Address
- Employee Job History
- Assignments by Organization
- Assignments by Organization Rollout

## Terminations with EEO Worksheet

This worksheet enables you to analyze terminations with ethnic origin over a specific time period.

### Business Questions

*Why are employees separating?*

### Parameters

You must specify values for the following parameters:

- Termination Budget Measurement Type
- Termination Date Lower
- Termination Date Upper

## Anniversary Birthdays Worksheet

This worksheet enables you to view birthdays and start dates of current employees. The worksheet also enables you to view other employee information, for example, length of service, employee number, and supervisor name.

### Business Questions

*When are the birthdays and anniversaries of my employees?*

### Parameters

This worksheet has no parameters.

## HR Temp List with Tenure Worksheet

This worksheet enables you to analyze deployment factors associated with positions, people in specific positions, and position applicants.

### Business Questions

*How are my employees deployed throughout my organization?*

### Parameters

This worksheet has no parameters.

## Employee Home Address Worksheet

This worksheet enables you to view the primary addresses of employees.

### Business Questions

*What are my employees' addresses?*

### Parameters

You must specify values for the following parameters:

- Person Name LIKE

To restrict the size of the list returned, you can enter part of the employee's name, preceded and followed by the % wildcard.

## Employee Job History Worksheet

This worksheet enables you to view employee job history across your organization.

### Business Questions

*When were my employees assigned to a particular job?*

### Parameters

You must specify values for the following parameters:

- Job Name

## Assignments by Organization Worksheet

This worksheet enables you to report on the assignments within your organizations.

### Business Questions

*How many assignments are present in each organization?*

### Parameters

This worksheet has no parameters.

## Assignments by Organization Rollup Worksheet

This worksheet enables you emulate the rollup flexibility of HRMSi reports by using an organization hierarchy to control the information displayed.

### Business Questions

*How many assignments are present in each organization?*

### Parameters

This worksheet has no parameters.

## Person/Assignment History Detail Workbook

This workbook enables you to track applicants, monitor workers' assignment history, and analyze termination history.

For a person's assignment history, you can analyze the following:

- Workforce movement within the organization
- Time between recruitment stages
- Trends via termination reasons

### Worksheets

This workbook has the following worksheets:

- Person Assignment
- Application
- Employee Separation

## Person Assignment Worksheet

This worksheet enables you to analyze a person's assignment history between specific dates. For each person you can examine:

- The current assignment
- Details of previous assignments

### Business Questions

*What has an employee been assigned to?*

### Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

## Application Worksheet

This worksheet enables you to analyze an applicant's assignment record between the start and end of an application.

For each employee you can examine the following:

- Total number of applications
- Number of successful applications
- Length of time between different application stages

### Business Questions

*Has a person previously made an application?*

### Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

## Employee Separation Worksheet

This worksheet enables you track termination reasons by type, date, and length of service, allowing you to spot trends among leavers. For each termination, you can:

- Compare termination reasons to discover trends.
- Compare the length of time in an organization against time in a job.

**Business Questions**

*Why are employees leaving the enterprise?*

**Parameters**

This worksheet has no parameters.



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# Request for Personnel Actions

## Requests for Personnel Action Overview

The Federal Request for Personnel Action form (RPA) automates the processing of personnel actions. The RPA resembles the familiar paper form and is easy to use. When you process an action, such as an Appointment, the application configures the RPA based on the Nature of Action family selected, and your role and responsibility.

Lists of values simplify data entry and business rules automate the form by performing calculations and validating data. The business rules are derived from the Guide to Processing Personnel Actions, the Guide to Personnel Data Standards, the Code of Federal Regulations, the Federal Employees Pay Comparability Act of 1990, United States Code, Government Organizations and Employees, and other federal personnel pay regulatory guidelines.

If your agency uses the National Finance Center (NFC) as an HR or payroll provider, you can generate extracts of the Notifications of Personnel Actions and submit this data to NFC.

See: National Finance Center Interface, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Security

Your role and responsibility as recognized by the system logon restrict access to the RPA and data entry in it. Assigning the user specific workflow roles and routing groups further determines which RPAs you can process.

For additional security, an agency can limit a user's access to sensitive data fields by creating a restricted version of the RPA and associating it to a user.

See: Creating a Restricted RPA, page 3-21

## Nature of Actions and the RPA

Each personnel action corresponds to a specific Nature of Action Code (NOAC). NOACs are grouped into families of related actions and assigned a family type that determines how the application populates data in an RPA. For example, the family type determines which fields the user must complete prior to updating the database and which business rules run before update.

See: Nature of Action Families, *Configuring, Reporting, and System Administration Guide*

When you choose a Nature of Action family from the Navigator menu, the application generates and configures the RPA based on the NOAC family information. For

example, when you enter the person's name in Part B of the RPA, the application automatically populates the RPA form with the applicable person and position information. The RPA form simplifies data entry by:

- Grouping Nature of Action Codes (NOACs) into families of related actions
- Shading data fields to indicate where to enter data
- Automatically entering related information based on the person and position such as the pay plan, job occupation code, and grade level
- Supplying default values for Extra Information
- Providing selected lists of values based on the NOAC, for example for Legal Authorities and Remarks
- Automatically entering required Remarks
- Computing pay amounts, based on the pay table, grade, step, PRD, and so forth

If supporting documentation is required, you can attach documents or use the Notepad for comments.

Many actions require position and person information. Taskflow buttons give you easy access to the Person, Position, and Position Description windows as well as the Extra Information types.

See: Request for Personnel Action Window, page 3-6

## Reviews and Approvals

By routing the RPA, you can ensure that you have captured and reviewed the necessary data and obtained the appropriate signatures before the final approval and update to the database. When processing the RPA, you can save the RPA to your workflow worklist or route the RPA to the next destination within your routing group

As you route the RPA, the application maintains a history of actions. By referring to the history, you can learn what action was taken, by whom, and on what date.

See: RPA Actions Based on Roles, page 3-6

After approving an RPA, you can submit the RPA for update to the HR database. You have the flexibility of immediately updating actions with current or retroactive effective dates. If the RPA has a future effective date, the application applies the necessary checks and edits and prompts you for any missing information. When the effective date is reached, the application reapplies the edits and notifies you of any missing information. After supplying the information, you can resubmit the RPA for update. After the update, you can then process further transactions against these records, including Cancellation and Correction actions.

See: RPA Signatures and Approvals, page 3-24, RPA Update to the Database, page 3-23, Refreshed Data and Data Maintenance, page 3-24

## Reports

When you update the RPA to the database, you can have the application automatically print the Notification of Personnel Action (Standard Form-50), or you can choose to manually print the RPA or a batch of RPAs from the concurrent manager.

See: Printed Notification of Personnel Action, page 3-25

To make it more convenient to view frequently accessed information about an employee or contingent worker, you can view information such as personal data, assignment and position details, pay and benefits, as well as the actions processed for that person. The Person Summary window extracts information from several windows and presents it in related tabbed regions.

See: Summarizing Personnel Data, page 2-26

## Key Concepts

To use the RPA, you need to understand the following key concepts and activities:

- NOACs, *Configuring, Reporting, and System Administration Guide*
- Workflow, *Configuring, Reporting, and System Administration Guide*
- Approvals, page 3-24
- Printing, page 3-25

## Requests for Personnel Action

The Federal Request for Personnel Action form (RPA) automates the processing of personnel actions. The RPA resembles the familiar paper form (Standard Form 52) and is easy to use.

The system configures the RPA based on the Nature of Action family selected, the user's role and responsibility as well as other securities that you set up. Lists of values simplify data entry, and business rules automate the form by performing calculations and validating data.

## Does Oracle Federal Human Resources ensure compliance with Office of Personnel Management (OPM) regulations?

The system applies position rules, Central Personnel Data File (CPDF) rules, and business rules to ensure database integrity. The position and CPDF rules are derived from the Guide to Processing Personnel Actions, the Code of Federal Regulations, the Federal Employees Pay Comparability Act of 1990, United States Code, Government Organizations and Employees, and other federal personnel regulatory guidelines.

## What security measures does Oracle Federal Human Resources offer?

Access to the form and data entry in it are restricted by the user's role and responsibility as recognized by the system logon. Information entered about the person in the Extra Information flexfield further defines user access.

By selecting the user's responsibility, the administrator determines which menu the user sees and with secure user profiles restricts the user's access to records by organization and position. By assigning the user specific workflow roles and routing groups, the administrator can determine which RPAs the user processes.

For additional security, an agency can limit a user's access to sensitive data fields by creating a restricted version of the RPA and associating it to a user.

## **Which Nature of Action Codes does Oracle Federal Human Resources support?**

The product supports all 145-OPM mandated Nature of Action Codes. The Nature of Action Codes (NOACs) are grouped into families of related actions. The families determine how data in the form is populated, which fields are required to update the database, what business rules run before update, and so forth.

## **How does the RPA automate processing personnel actions?**

The system generates and configures the RPA based on the NOAC family information. The RPA form simplifies data entry by:

- grouping Nature of Action Codes (NOACs) into families of related actions
- shading data fields to indicate where to enter data
- automatically entering related information based on the person and position
- supplying default values for Extra Information
- providing selected lists of values based on the NOAC, for example for Legal Authorities and Remarks
- automatically entering required Remarks
- computing pay amounts, based on the pay table, grade, step, PRD, and so forth

If supporting documentation is required, the user can attach documents or use the Notepad for comments.

Many actions require position and person information. Taskflow buttons allow users easy access to the system's person, position, and position description windows as well as the Extra Information flexfields.

## **Does the product support electronic signatures?**

Workflow functionality enables the routing of the RPA for data entry, signature, and review before the final approval and update to the database. Based on the agency's practices, the user can route the RPA to the next destination within the routing group--an individual, groupbox, or routing list.

As the RPA is routed, the system maintains a history of actions. By referring to the history, users can learn what action was taken, by whom, and on what date.

## **Does the product generate printed Notifications of Personnel Action?**

When the RPA is updated to the database, the user can have the system automatically print the Notification of Personnel Action (Standard Form-50) or manually print it from the Concurrent Manager.

## **Does the product support future and retroactive actions?**

After the Personnelist approves the RPA, he or she can submit the RPA for update to the HR database. For RPAs with current or retroactive effective dates, the system validates the data by applying database, position, assignment, agency, and Central Personnel Data File (CPDF) edits. If the edits pass, the corresponding data in the personnel records is immediately updated. The data is then available for further transactions, including cancellation and correction actions.

If any information is missing, error messages inform the user which data fields need to be completed or corrected. Once the form is corrected, the user can resubmit the form for update.

If the RPA has a future effective date, the system applies the necessary checks and edits and prompts the user if any information is missing. When the effective date is reached, the system reapplies the edits and notifies the user of any missing information. (A process the administrator sets up in the Concurrent Manager initiates the processing of future actions.)

### **Does the product support Cancellation and Correction actions?**

If the Servicing Personnel Office determines that information on a Notification of Personnel Action is inaccurate or an action is invalid or improper, the Personnelist can issue a Correction or Cancellation.

# RPA Process

## Request for Personnel Action (RPA) Window

Using the automated Request for Personnel Action standard form (RPA), supervisors and managers can process employee and position actions, and the Personnel Office can record staffing and classification actions.

The RPA online form consists of tabbed sections that correspond to the paper form. For easy reference, the RPA also includes the field numbers that appear on the paper form.

To make data entry easier, shading is used to indicate where you can enter or only view data. The following table describes the actions you can take based on the field color.

### ***Actions based on Field Colors***

<b>Field Color</b>	<b>Meaning</b>	<b>Process Method</b>
White	Enter or edit data	User Enterable (UE) or Auto Populate User Enterable (APUE)
Gray	View displayed data. If the field contains no data, skip the field.	Auto Populate (AP) or Non Enterable (NE)
Asterisks	Skip the field (the application hides the data)	Non display

## Taskflow buttons

Taskflow buttons on the form provide easy access to related windows, such as the People and Position windows and the history of actions taken on the RPA.

You can limit users' access to taskflows when you set up responsibilities.

## RPA Actions Based on Roles

The actions that you take and the amount of information that you complete on the RPA form depend on the role that you're assigned and your agency's business practices. In general, only Personnelists are assigned all roles.

You can have more than one role for a given routing group and you may belong to more than one routing group. The following table describes the valid combinations of roles.

**Valid Combination Roles**

<b>Role</b>	<b>Can also be assigned role(s) as</b>
Initiator	Requester Authorizer Personnelist Approver (if assigned as Personnelist)
Requester	Initiator Authorizer Personnelist Approver (if assigned as Personnelist)
Authorizer	Initiator Requester Personnelist Approver (if assigned as Personnelist)
Personnelist	Initiator Requester Authorizer Approver
Reviewer	Initiator
Approver	Initiator Requester Authorizer Personnelist (must be assigned this role to approve actions)

Managers are often assigned the role of Initiator, Requester, Authorizer, or Reviewer. The roles of the Personnelist and Approver are usually reserved for employees in the Human Resource Office. In general, Personnelists and Approvers are assigned all the roles so that they can fully process an RPA.

**Actions Each Role Can Perform**

The following table describes what actions a user can take when assigned a specific role.

### ***Roles and Actions***

<b>If your role is....</b>	<b>You can...</b>
Initiator	Create an RPA
Requester	Sign in the Requester field, edit data, indicate interim approval
Authorizer	Sign in the Authorizer field, review and edit data, indicate interim approval
Reviewer	Review the RPA, view data only
Personnelist	Indicate interim approval, edit the RPA, complete the RPA, submit the RPA to Update to HR after the RPA has been approved.
Approver	Indicate interim approval, edit the RPA, complete the RPA, approve the RPA, submit the RPA to Update to HR

As a security precaution, if you have more than one role in a routing group, the role you have when opening an RPA from the groupbox determines the role level you have when re-routing the RPA to yourself.

For example, if you are assigned the role of Authorizer and Approver as an individual and assigned the role of Authorizer as part of a groupbox, if you route an action to yourself outside of the groupbox, you may only process the RPA as an Authorizer.

## **Extra Information and the RPA**

The RPA form includes an Extra Information flexfield for easy entry of:

- Personnel data items that accompany the specific NOA that you're processing
- Agency data items reserved on the form for agency use (field 25 in the Employee Data section, and fields 40-44 in the Position Data section)
- Payroll, performance appraisal, and position description data items required for processing an RPA

When you initiate a Request for Personnel Action, the application displays the Extra Information fields related to the Nature of Action (NOA) family. The fields include data items required to pass the Central Personnel Data File (CPDF) edits, as well as optional data items that accompany a specific NOAC.

The application populates the RPA fields and Extra Information fields based on the effective date, or if there is none, on the current system date. The application supplies values from the database for those data items completed by earlier RPAs or by direct data entry. For example, in a promotion action to a new position, the application displays the values that you entered in the Position Extra Information flexfields when you established the position.

If you taskflow from the RPA to the Person, Position, or Assignment Extra Information, the application datetracks the Extra Information based on the RPA's effective date, or if there is none, the current system date.



Before update, the application refreshes the unchanged Extra Information with data from the database (based on the RPA's effective date). In this way, the application ensures that only new or changed data is updated to the database.

After the application updates the database, you can view the updated data in the forms, Extra Information, and Special Information fields.

See: Refreshed Data and Data Maintenance, page 3-24, Extra Information Types, *Configuring, Reporting, and System Administration Guide*

## Pay Calculation on an RPA

The application automatically calculates an employee's pay when you process pay-related personnel actions. For example, calculation rules facilitate processing individual Request for Personnel Action (RPA) actions such as Appointment and Promotion actions, mass salary actions such as Annual Pay Adjustments, and automatic mass actions such as Within Grade Increases.

The pay system or pay schedule associated to the employee's position or retained grade determines the employee's compensation and sets the employee's rate of basic pay. Oracle US Federal HR includes predefined elements for pay and standard and special rate pay tables commonly used in federal agencies.

## Components of Total Salary

The application automatically calculates the total pay using the following elements to determine the Total Salary in an RPA:

- Basic Pay
- Locality Adjustment or Special Rate Supplement where applicable
- Adjusted Basic Pay
- Other Pay when applicable, including Availability Pay (AP), Administratively Uncontrollable Overtime (AUO), and Supervisory Differential
- Total Pay

Automatic pay calculations occur when you process an action that changes the person's:

- Position (pay table identifier or valid grade)
- Pay Rate Determinant (PRD)
- Step or Rate
- Duty Station when Locality Area and Percentage Change
- Retained Grade
- Locality Area and Locality Percentage

## Manual Calculations

If you process an RPA that does not automatically calculate pay, such as an Appointment for an employee with Retained Pay, the application informs you that you must manually enter the pay information, and then opens the pay fields for direct data entry.

If you change information on an RPA that precludes automatic calculation, such as a change from non-Retained Pay to Retained Pay, the application retains the salary

information and opens the pay fields for manual entry, and no further automatic changes to salary amounts occur.

## Pay Tables and Pay Plans

Oracle US Federal HR supplies pay tables commonly used by US Federal agencies as a basis for calculating pay. You can also set up agency-specific pay tables and pay plans. For example, you might set up Federal Wage System (FWS) pay tables for regional pay rates.

The predefined pay tables include:

- GS and equivalent standard and special rate pay tables for national and worldwide pay plans
- Senior Executive (ESSL) pay tables for SES equivalent pay range pay plans

The application also supports FWS pay calculations and supplies FWS equivalent pay plan and grade combinations.

An Assignment extra information segment (Calculation Pay Table) stores the pay table identifier used to calculate the person's current pay.

See: Grade and Pay Structures, *Oracle HRMS Compensation and Benefits Management Guide*

## Federal Regulations and Pay Calculations

Federal regulation updates issued by the Office of Personnel Management (OPM) affect how you compensate your employees. The RPA process captures the information required to calculate an employee's pay based on these regulations.

For example, the Federal Wage Flexibility Act (FWFA) affects how agencies apply special rate schedules. When you process a salary change action or an automatic Within Grade Increases (WGI) or Quality Step Increases (QSI) for GS and equivalent pay plans, the application determines if the person's position or retained grade contains a special rate table. The pay calculation process sets the Pay Rate Determinant (PRD) based on whether locality or special rate supplement entitlements apply, and then calculates the person's pay accordingly.

Using an RPA mass process, you can update employee and position records when OPM ends a special rate table or a specific pay plan, grade and step combination.

See: FWFA Pay Process, *Oracle HRMS Compensation and Benefit Management Guide*

## Senior Executive Service Pay

You can appoint Senior Executive Service (SES) applicants to SES pay range positions. When you process an RPA and choose an SES position, the application verifies that the resulting basic pay against the predefined Senior Executive Service (ESSL) pay table for SES equivalent pay plans and ensures that the pay falls within the minimum and maximum allowable amounts for Total Pay and Adjusted Basic Pay. For annual pay adjustments, you can process a Mass Salary action to award percentage increases.

See: Processing a Mass Percent Pay Adjustment, *Oracle HRMS Compensation and Benefits Management Guide*

If you have employees paid on SES pay tables, you must establish and then certify performance appraisal systems used as a basis for administering salary increases for these employees. When you process pay adjustment actions for SES employees, business rules

apply pay cap checks based upon your agency's level of certification: full, provisional, or none.

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

If you have agency-specific pay range plans, you can also define agency pay tables and pay plans and then process individual and mass salary actions for the employees on these pay plans. You define pay range tables and pay plans using the standard implementation steps.

See: Set up Pay Plans, Grades, and Compensation, *Compensation and Benefits Management Guide*

## Law Enforcement Officers Pay

The application calculates locality adjustment pay for Law Enforcement Officers. You indicate whether a position is a Law Enforcement Officer (LEO) position by entering a 1 or 2 in the LEO Indicator field in Position Group 2 Extra Information. The application also calculates LEO pay for those employees on Retained Pay Rate Determinant of E or F based on Oracle US Federal pay table 0491.

## Date Last Equivalent Increase

The Date Last Equivalent Increase (DLEI) reflects the date on which employees received their latest equivalent pay increases. The NOAC you select when processing an RPA determines whether the application automatically updates the DLEI data segment of the RPA extra information with the RPA effective date or whether you enter a date.

For example, the application automatically updates all appropriate Appointment actions (NOAC 100s) with the RPA effective date. With Transfer actions (NOAC 130), the DLEI does not always correspond to the RPA effective date, so you can enter the DLEI.

When you update the RPA to the database, the application updates the employee's Within Grade Increase element with the DLEI.

## Maximum Earning Calculations

The application calculates an employee's annual pay and compares it to a maximum dollar amount to determine whether the employee exceeds the maximum salary amount. The application performs this pay cap check when it:

- Calculates the pay on an RPA or mass action such as a Mass Salary action
- Updates the action to the HR database

When the application calculates pay, if the Adjusted Basic Pay (Basic Pay and Locality Pay) meets the pay cap limits, the application adjusts the Locality Pay. The application then compares the Total Pay to the aggregate pay limits.

If an employee has Other Pay, such as AUO or Availability Pay, the application:

- Sets the Total Pay at the capped limit.
- Displays the amount necessary to reduce the AUO to keep it within the limit as the Capped Other Pay (Total Pay cap minus the Adjusted Basic Pay) on the RPA. Upon update to HR, the application stores the amount in the Other Pay element.

The application retains the actual authorized amounts for AUO, Availability Pay, and Supervisory Differential. If the pay reaches the aggregate pay limitation, then these non-discretionary payments carry-over to the following calendar year.

## Supervisory Differential

When you grant an employee Supervisory Differential, you process an Other Pay action and enter the amount or percentage of differential to pay the employee. The application includes this resulting amount in the calculation of Other Pay, and stores the information in the Supervisory Differential element. If the person's basic pay changes, the application retains the amount of the Supervisory Differential.

If you process a NOAC 702, 703, 713, 500-599, 781, 892, 893, or 894, the application informs you that you must process an 810 NOAC Change in Allowance/Differential to change or terminate the percentage or amount of the authorized Supervisory Differential.

## Restricted RPA Form

The process methods assigned to a data field on an RPA for a given NOA family initially configure the RPA form.

The product defines process methods for each Nature of Action (NOA) family based on the Office of Personnel Management (OPM) process rules. Process methods determine which fields you can enter or edit.

For security purposes, you can further restrict user access to the data on an RPA by creating restricted forms and assigning them to users. The restricted form is commonly used by the manager or the administrative staff.

Restricted forms don't change the underlying process methods, only the view of the data. You specify which fields you want to set to display only or non-display (the data is replaced by asterisks). When you restrict access to a specific field, such as data of birth, that field is restricted on all personnel actions that the user processes.

The restricted form is particularly convenient for users with roles of Initiator, Requester, and Authorizer who routinely complete selected items.

In addition to restricting the form, you can restrict the user's access to Extra Information.

## Processing Methods

Changing the process method on a restricted form changes the field display attribute, but doesn't affect how the system processes data.

The following table shows what effect the display and non-display options have on the process methods.

### ***Process Methods***

<b>Processing Method</b>	<b>Restricted Process Method Set to Non Display</b>	<b>Restricted Process Method Set to Display Only</b>
Non enterable	No change	No change
Auto populate	Data replaced by equal number of asterisks	No change
User enterable and Auto populate user enterable	Field color is gray Data replaced by equal number of asterisks Can't update or insert data Not navigable	Field color is gray Can't update or insert data Not navigable

## **The RPA Routing History**

The application maintains a record of each action taken on an RPA as it is processed. There are two ways to view the history:

- From the RPA, choose the History button.
- From the Workflow work list, select the RPA, choose Open to display the Workflow notification, and then choose the References button.

The Routing History contains an Action History and a Routing History. You can see the progress of a form as it's routed, including individual destinations and groupbox destinations.

Refer to the status column in the table below for an explanation of each action taken.

### **Statutes and Actions**

<b>Status</b>	<b>Action taken</b>
Initiated	RPA is initiated
Requested	Requester signed Part A
Authorized	Authorizer signed Part A
Reviewed	Reviewer displayed the RPA
Update to HR	RPA has been submitted to the database for validation and edits
Update HR complete	RPA has successfully passed edits
Not routed	RPA was saved but not routed
No action	User did not initiate, sign, or cancel the RPA
Cancelled	RPA has been cancelled
Future action	The approved RPA is held by the system in a separate file until the effective date is reached. You can view the RPA and its history from the Approved Requests for Personnel Action window as explained in Cancelling and Correcting Future Actions, page 3-34.

## **Productivity Data**

Productivity data permits you to assess work loads and to locate problem areas so that you can reduce conditions causing delays. The application includes functionality for entering and maintaining this data.

When you route an RPA, the application enters an RPA status in the Routing History, such as Authorized. Some actions that you take to process an RPA are external to the RPA, such as placing phone calls or obtaining confirmation from another organizations. You can record these actions using the Event History window.

When an event (action) occurs, you enter an event code and the start and end date on which the actions occurred. The application automatically supplies the event descriptions and calculates the elapsed time for you in days, skipping weekends. You can also add comments about the event in the comments field.

For example, if you make someone a job offer, you could choose an event code for that action and enter the date on which you made the job offer. When the applicant accepts, you would record the acceptance date, and the application would complete the necessary descriptions and calculate the elapsed time.

Each RPA that you initiate has an associated Event History window as does each Position that you create.

**Note:** Cancellations and Corrections are new actions, so the Event History for these actions is not a continuation of the original RPA.

## Processing a Request for Personnel Action (RPA)

The process for completing an RPA follows the steps you usually take when processing the paper version.

If your role is an initiator, you create an RPA; otherwise you respond to an RPA routed to you. You enter the information required by your role on the RPA and when you have entered that information, you route the RPA to the Human Resource Office for regulatory data and signatures. When the action has been approved by the Personnelist and the record updated, you can print the Notification of Personnel Action, send a copy to the employee, and file it in the employee's Official Personnel Folder.

Use the Request for Personnel Action window.

### To complete a Request for Personnel Action (RPA):

1. If you are an Initiator, select a Nature of Action (NOA) family from the Navigator.

The application enters the name of the NOA family in the Action Requested field and shows you which fields to enter for that NOA family. If there is only one Nature of Action code for the family, such as Change in FEGLI, the application enters the Action Requested and NOA code and description.

**Note:** If you are not an Initiator, open your Workflow worklist, and open an RPA routed to you or your groupbox, as described in *Querying Notifications from Your Worklist, Configuring, Reporting, and System Administration Guide*.

2. Choose a routing group, if necessary.

When you initiate an RPA, the application uses the default routing group to which you belong. If you want to route the RPA using a different routing group, choose the Routing Group icon (located on the upper left corner of the form), and select a different routing group from the Routing Groups list.

**Warning:** You cannot change the Routing Group after you have saved the RPA to your personal worklist or routed it to the next destination.

3. Select a person by entering his or her last name or social security number. (The application does not allow you to select your own name.)

As a shortcut, you can choose the person's name from the List of Values. Last names are listed alphabetically and by case so that, for example, the last name 'Young' precedes the last name 'de Rosa.'

The application lists any pending actions it finds for the user. Pending actions include current and future actions that haven't been updated to the database.

4. Complete the fields appropriate to the personnel action that you are processing.

Many of the fields have Lists of Values that you can choose to quickly complete the required data. If the field requires information, such as Remarks, the application displays an insertion dialog prompting you for information. Enter the requested information.

**Note:** Until you enter an effective date, the application date determines the information the application populates on the RPA form and the values displayed on the List of Values.

5. Use the tabs to navigate to the other RPA pages. Complete the information requested in each window.

**Note:** At any time, you can save the RPA to your Workflow worklist and complete it later.

6. Click the Extra Information taskflow button to save the information you have entered so far and to enter the non-RPA data that accompanies the RPA.

A few Extra Information segments contain insertion data; however, you cannot enter insertion data in an Extra Information segment. For example, you cannot enter insertion information in the Legal Authority Description text of the Original Appointment Authority.

**Note:** If you navigate to the Position or People form to change Extra Information there, check the date on these windows before you begin entering data, and if necessary, reset it to correspond to the effective date of your action by datetracking. See: Completing Agency Data and Non-RPA Data, page 3-8.

7. If you are assigned the role of Requester or Authorizer, enter your signature in Part A of the RPA by choosing your name from the List of Values.
8. When you're done, save the RPA, and when presented with the choice of routing the RPA, choose Yes.

The RPA dialog presents you with the options to save the RPA to your workflow worklist; indicate your interim approval; and continue routing the RPA to a person, groupbox, or routing list.

9. If you are assigned the role of Approver, you can choose the Approval box on the Routing dialog box.

The printed Notification of Personnel Action (SF50) includes the name, working title, and approval date of the Approver who last approved the action.

10. Update the RPA to the database.

Approvers can update the RPA to the HR database, or route the RPA to the person responsible for updating RPAs.

See: Signing, Approving, and Updating an RPA, page 3-26

11. To have the application print the Notification of Personnel Action (SF50) when it updates the RPA, choose Print Notification from the Routing dialog box.

The option to Print the Notification of Personnel Action is only available after you submit the action for update to HR. See: Printing the Notification of Personnel Action, page 3-28



## Setting Effective Dates on the Request for Personnel Action (RPA)

The product supports current and future dated actions, and the processing of retroactive actions.

The application uses the effective date, or if there is none, the current system date to populate the information on the RPA form and the values displayed on the List of Values.

### To set the effective date:

1. Choose a date for the Proposed Effective Date (Part A) from the List of Values calendar or enter one manually.
2. Choose a date for the Effective Date (Part B) from the List of Values calendar or enter one manually.

When the application updates the RPA to the database, it uses the Effective Date (Part B) as the record date.

**Note:** The application allows you to customize the view of the date format on the form; however, the printed Notification of Personnel Action displays the OPM format of month, day, year (MM\_DD\_YY).

### RPA and the Person and Position Extra Information

The Person and Position Extra Information windows are datetracked. The effective date on the RPA determines which data the application retrieves for the RPA.

If you taskflow from the RPA to the Person or Position Extra Information to correct or supply missing information, the application automatically datetracks these windows to the corresponding effective date.

If you are entering information *directly* in the Position and Person Extra Information windows without having first taskflowed from the RPA, then you must datetrack these windows to the appropriate effective date.

**Note:** To easily synchronize data entry, you can choose a baseline date for initially entering and later correcting information. For example, you might choose the date that the person was hired or the date on which you created the position.

## Entering Remarks on an RPA

For Nature of Actions that require mandatory Remarks, the system supplies the Remark code and description in the Part F section of the RPA. You can't delete the mandatory Remarks.

You can enter the Remarks in any order on the RPA. When the system prints the Notification of Personnel Action, it prints the required Remarks in the order consistent with the Office of Personnel Management (OPM). It prints the non-required Remarks in the sort order indicated on the Remark Codes and Descriptions window.

If the OPM changes a Remark or authorizes a new one, you can edit the Remarks with the maintenance forms (Remark Codes and Descriptions and NOA Codes and Remarks).

See: Maintaining Remark Codes and Descriptions, *Configuring, Reporting, and System Administration Guide*.

## Entering Remarks

Use the Request for Personnel Actions window.

### To enter Remarks:

1. Choose a Remark from the List of Values.

If there is only one applicable Remark, the system enters it automatically.

If the Remark requires additional information, an insertion dialog box appears when you choose the Remark code. Enter the text and choose OK.

If you need to edit the text that you entered, place your cursor in the Remark code field and press the tab key to move to the description field. The dialog box appears again, and you can change the text there.

### Free Form Remarks

Free form insertion of Remarks are supported for all Nature of Action Codes in Part D-Remarks by Requesting Office. You can enter up to 2000 characters and you can enter more than one ZZZ Remark, if necessary.

**Note:** The Yes/No buttons in Part D are only available when processing a separation action. If you choose Yes, the system sets the Remark section to non-enterable to prevent any data entry. Attach supporting documents for the resignation or retirement using the functionality explained in Enclosing Attachments and Notes, page 3-19.

### To enter your own text for a Remark:

1. Choose the ZZZ Remark to display a text entry field where you can enter the applicable text.

### Removing Remarks

You remove automatically inserted Remarks by replacing them with other Remarks.

### To remove Remarks:

1. Place your cursor in the Remarks field and choose the Delete icon from the toolbar.
2. Choose a different Remark from the List of Values.

## Entering Legal Authority Codes (LACs) on an RPA

The product includes predefined Legal Authority Codes (LACs) and descriptions that you can choose when processing an RPA.

If the OPM changes a Legal Authority or authorizes a new code, you can edit the Legal Authority Codes with the maintenance forms.

See: *Maintaining Legal Authority Codes, Configuring, Reporting, and System Administration Guide*

Use the Request for Personnel Actions window.

### To enter Legal Authority Codes:

1. Choose a Legal Authority Code from the List of Values.

If there is only one applicable code, the application enters it automatically.

If the Legal Authority code requires additional information, a dialog box appears when you choose the code. Enter the text and choose OK.

To edit the text that you entered, place your cursor in the Legal Authority code field and press the tab key to move to the description field. The dialog box appears again, and you can change the text there.

### **Deleting Legal Authority Codes**

You delete a LAC by removing or replacing it.

#### **To remove or replace Legal Authority Codes:**

1. Position your cursor in the Legal Authority Code field and choosing the Delete icon from the toolbar.
2. Choose a different Legal Authority Code from the List of Values.

## **Enclosing Attachments and Notes to an RPA**

When processing a RPA, you can attach a note that travels with the RPA. This note is not printed with the Notification of Personnel Action.

If you need to submit supporting documents with an RPA, you can use the attachment functionality. See: *Using Attachments, Configuring, Reporting, and System Administration Guide*.

Use the Notepad window.

#### **To attach a note:**

1. Choose the Notepad icon located on the top left corner of the RPA.
2. Choose the New button.
3. Enter the text.
4. Choose OK.

#### **Editing a Note**

Use the Notepad window.

#### **To add or edit text:**

1. Open the Notepad.
2. Choose the Append button and choose OK.

#### **Deleting a Note**

Use the Notepad window.

#### **To delete a note:**

1. Open the note.
2. Choose the Delete button and choose OK.

## **Processing Dual Actions**

For actions that share the same effective date, the Office of Personnel Management (OPM) has authorized that agencies can process dual actions on the same RPA. For

example, an agency can process a Change in Work Schedule that has the same effective date as a Reassignment.

Some actions you must process as separate actions. For example if you are processing a pay action such as a pay adjustment or a Within Grade Increase on the same effective date as a Return to Duty, Non Pay or Extension of Not To Exceed action, you must process a second action, not a dual action.

If you need to cancel or correct an RPA that contains dual actions, cancel or correct each action separately. See *Cancelling or Correcting an RPA*, page 3-34.

Use the Request for Personnel Actions window.

#### **To process a dual action:**

1. Follow the usual steps for initiating an RPA.

See: *Processing a Request for Personnel Action*, page 3-15

2. Enter a First Action Nature of Action Code.
3. Enter a First Action Legal Authority Code.
4. Enter a Second Action Nature of Action Code.
5. Enter a Second Action Legal Authority Code.
6. Continue processing, routing, and approving the RPA as usual.

**Note:** Certain dual actions require that you enter two Legal Authority Codes (LACs) for both Nature of Action Codes. If you receive an error message when you update a dual action to the HR database, make sure that you have entered the appropriate LACs for both actions.

See: *Processing a Request for Personnel Action*, page 3-15

## **Changing NOA Families on an RPA**

If you receive an RPA that requires a different action, you can change the Nature of Action family using the Change Family button. For example, a manager may initiate a Recruit and Fill, which the Personnelist may change to an Appointment.

Because most Change of Family actions involve replacement actions based on the verbal approval of the Requestor and Authorizer, the application retains the information in Part A.

Use the Worklist window.

#### **To change families:**

1. Locate the RPA that you want to change in the worklist window and open it.
2. Choose the Change Family button.

**Note:** The application supports Change of Family functionality for all Nature of Action codes except Cancellation and Correction actions.

3. Choose a family of Nature of Actions from the Families list.

The application re-enters the information in Part A and clears the rest of the information.

4. Enter the Nature of Action code on the RPA.
5. Continue to enter data, following the usual process for completing and routing the RPA.

## Entering Productivity Data

Each RPA that you initiate has an associated Event History window as does each Position that you create. You can enter information about actions required in processing an RPA that are external to completing an RPA, such as placing phone calls or obtaining confirmation from another organizations.

You record information about these actions using the Event History window.

### To enter productivity data:

1. From the RPA or Positions window, click the Others button and select Event History in the Navigation Options window and click OK.
2. In the Event History window, choose an Event Code from the list of values.

The application enters information, such as the Description and Category Code, the Start and End Date descriptions. It displays the Standard (STD) Completion Time and automatically calculates the elapsed time, skipping weekends. .

3. Enter a Start or End Date if you are beginning or ending the activity. (If the application entered a default date and that date does not reflect when you started or ended the activity, you can change the date.)
4. In the Comments field, enter information about the activity.
5. Save your information.

## Creating a Restricted RPA

The product comes with a standard RPA and a restricted version, Oracle Federal Restricted Request for Personnel Action. The standard unrestricted form includes all the fields that the HR Specialist can access. The restricted form limits the data fields provided and masks commonly restricted data items, such as the social security number and date of birth.

Agencies can create their own restricted forms that limit users' access and view of specific fields and data items.

Use the Application Utilities Lookup window.

### To create a restricted RPA:

1. Query GHR\_US\_RESTRICTED\_FORM.
2. In the Code field, enter the form name that you want to appear on the US Government User Information List of Values.
3. In the Meaning field, enter the descriptive name that's listed in the List of Values for the Restricted Form Process Methods window.
4. Choose the Enabled box to enable the form.

### **Adding Fields to the RPA**

Use the Restricted Forms Process Methods window.

#### **To add fields to the RPA:**

1. Query the Restricted Form Name field to see the list of available forms names.
2. Select a form name.
3. In the Data Field Name, choose the RPA field from the List of Values that you want to change.
4. In the Restricted Process Method, choose the field display from the List of Values. You have a choice of defining the field as:
  - Non display (data is replaced with asterisks)
  - Display only
5. Repeat steps 4 and 5 for each data field that you want to change.

# RPA Approve, Update, and Print RPAs

## RPA Update to the HR Database

The effective date determines when the system updates an approved action to the HR database.

- If the action is for the *current date or an earlier retroactive date*, the application updates the database and generates a Notification of Personnel Action.

The application applies the data contained in the Notification to the appropriate position and personnel records, replacing existing values with ones you entered or changed on your RPA.

- If the RPA is for a *future effective date*, the application performs edit checks at the time the action is updated and again at the effective date.

This edit check permits the application to take into account any intervening changes, such as a salary change that would affect the pay amounts.

If during the edit check, the RPA data does not pass the edits, the application routes the RPA to the Workflow Inbox of the person who submitted the RPA for update so that he or she can make the necessary corrections. Once the corrections are made, the RPA can be resubmitted for update. The application reapplies the edit checks, and if they pass, updates the data to the database.

The application holds actions with future effective dates until the date is reached. You instruct the application to process future actions by setting up a Concurrent Manager program.

## Order of Processing for NOACs

If multiple actions occur on the same future effective date for an employee, for example a Mass Salary adjustment and a Within Grade Increase, the application processes the NOAC with the highest priority and returns the other NOACs to the person who submitted the action for update to the database for review and possible cancellation or correction. For example, if an employee is due a Mass Salary and a promotion on the same effective date, the application would process the Mass Salary (the NOAC with the highest priority), and return the promotion to the person who updated the database.

If multiple actions occur on the same current or retroactive date for an employee, when you update the action, the application displays a message that lists actions that have been updated on that day as well as pending actions. You can then take the necessary steps to cancel or correct the other actions.

**Warning:** Do not change the NOAC order of processing. The order of processing is predefined so that employee records are properly updated and maintained. Changing the NOAC order of processing may severely impact the database when you update records. For example, if you assign Pay Adjustment NOAC 894 a lower processing number than Promotion NOAC 702, the application may incorrectly calculate the employee's promotion salary.

## Refreshed Data and Data Maintenance

When you open an RPA from your Worklist or route it, the application automatically refreshes the data. It lists the data that changed due to updated RPAs or manual data maintenance of person and position information.

You can also manually display new or changed data by choosing the Refresh button. You might do this after you:

- Navigate to another window, such as the Person or Position window to perform data maintenance on optional RPA data
- Enter RPA Extra Information that is also displayed in an RPA fields

For example, if you are processing a Realignment action (NOAC 790) and enter a new position's organization in the Extra Information, you can choose the Refresh button to display it on the RPA.

## Inter-related Actions

When you update an RPA to the database, the application lists all RPAs updated on that date for the person or position and any pending future actions. If in reviewing this list, you decide that certain actions affect pending actions, you can cancel, correct, or resubmit these pending actions as warranted.

For example, you might wish to cancel a pending a Within Grade Increase (WGI) if you are updating a Promotion action or to correct the WGI effective date to coincide with the promotion effective date.

See: Canceling or Correcting an RPA , page 3-34

## RPA Signatures and Approvals

Electronic authentication is based on system security. By basing security on roles, responsibilities, and unique logon names, the application ensures that the user's access and signature is unique to the user and under his or her control.

## Electronic Authentication

The role assigned to you as a user determines your signing authority on the RPA form.

The printed RPA in Part C displays the last six Approvers and Personnelists who processed the action by saving the RPA to their Personal Inbox. The signature block includes the:

- Personnelist or approver's full name
- Personnelist or approver's office (from the Office Symbol field in the Extra Person Information flexfield)
- Date that he or she routed the action

Block C-2 of the printed RPA contains:

- Last approver's name (first name, middle initial, last name)
- Working title (from the Position Working Title field in the Extra Person Information flexfield)
- Date the approver approved the RPA



You can designate a different person to sign the RPA than the Notification of Personnel Action (NPA) by determining who approves the RPA and who updates the HR database.

The RPA displays the full name, working title, and the date of the person who last approved the action. The printed individual NPA displays the full name, working title, and the date of the person who updated the action to the HR database.

The Notifications for mass actions such as Realignments, Salary Adjustments, Transfers, and Automatic Within-Grade Increases display the name of the Approving Officer that you entered on the Personnel Office Identifier (POI) maintenance form.

## RPA Approval

Only employees assigned the role of Approver can approve an RPA. Although the Approver must be assigned the role of Personnelist, in practice, the Approver is usually assigned all roles. In this way, the Approver can perform all the tasks required to process an action and update the employee's records.

The application maintains the date of approval, the data transmitted, and the name and position of the person who took the action. This information is stored as historical data and can be viewed from the Workflow worklist (References button) or from within the RPA (History button).

## Printed Notification of Personnel Action

The application generates a Notification of Personnel Actions (NPA) only on appropriated positions. You can have the application print a NPA when it updates a personnel action to the HR database. You can print:

- An NPA when you submit the RPA for update on a current or retroactive action

**Note:** You cannot use this option to print future actions. When the effective date is reached and the application updates the database, you can print the NPA from the Concurrent Manager or the Workflow worklist.

- A single NPA from the Concurrent Manager after the application updates the database
- NPAs in batch after the application updates the database

**Note:** It's recommended that you do not set up a default printer for printing NPAs from the Concurrent Manager. You won't be able to override this choice when you request automatic printing.

The information you approved on the RPA is printed in the NPA. The application also:

- Prints the approving official's full name, title, and approval date
- Orders and prints the Remarks in the correct sequence
- Replaces the numeric steps for Administrative Law Judges (AL) pay plan with alphabetical designation (A-L), and numeric steps for Executive Pay (EX) plan with roman numerals.
- Prints the Name and Location of Position's Organization

The application inserts this information from the organization specified in the Position Group 1 flexfield. The organization address or hierarchy information is entered in the Organization window as the HR Organization's Extra Information US Fed Reporting Info.

See: HR Organizations: Entering US Federal Reporting Information, *Enterprise and Workforce Management Guide*

## Signing an RPA

Electronic authentication is based on system security. By basing security on roles, responsibilities, and each user's unique logon, the application ensures that the user's access and signature is unique to the user and under his or her control.

The role assigned to you as a user determines your signing authority on the RPA form.

### To sign an RPA:

1. Sign Part A of the RPA by choosing your name from a List of Values in the appropriate signature block.

If your role permits you to sign as Requester and Authorizer, you can choose your name in both locations.

See: Approving an RPA, page 3-26

## Approving an RPA

Only employees assigned the role of Approver can approve an RPA. If you are not an Approver, you can check the Interim Approval box.

### To approve an RPA:

1. Save the RPA.
2. In the Routing window, check the Approval box.

The Approver can submit the RPA for edits and update to HR or return the RPA to the Personnelist to update HR.

**Note:** If you initiate and approve an action without routing it to anyone else, save the RPA to your Workflow worklist before you choose Update HR. By saving it to your worklist, you create a history of that action that is viewable later from your Workflow worklist.

### To indicate interim approval:

1. Save the RPA.
2. In the Routing window, check the Interim Approval box.

Checking this box does not update the personnel records. If you do not approve the action, you can use the Notepad to explain the disapproval, and return it to the Initiator or reroute it.

## Displaying Refreshed RPA Information

The RPA also contains a Refresh button so that you can:

- Refresh the information shown on the RPA that's entered from the RPA Extra Information

For example, if you are processing a Realignment action (NOAC 790) and enter a new position's organization in the RPA Extra Information, you can choose the Refresh button to display it on the RPA.

- Display data maintenance changes without having to close and then reopen the RPA to display these changes.

For example, if you notice that the year an employee attained a degree is entered incorrectly, you can taskflow to Special Information, enter the correct date, return to the RPA, and then choose Refresh to display the data change on the RPA.

#### **To refresh the information on the RPA:**

1. Choose the Refresh button.

## **Processing Your Own RPA**

As a security measure, the system does not allow you to process your own RPA. If someone sends an RPA about you to a groupbox that you belong to, you cannot view the RPA. Similarly, the system prevents you from routing an RPA to a person whose RPA you are processing.

1. If your agency permits you to process your own RPA, you can do so by creating a dummy employee and routing the action to that person.

## **Printing the RPA**

You can print using a postscript printer RPAs for those applicants and employees within your security profile. You can print the RPA after the RPA successfully passes the required edits and the application updates the database.

#### **To print an RPA from the Concurrent Manager:**

1. Display the Submit Requests window.
2. In the Name field, select Request for Personnel Action.
3. Enter the Employee Name in the Parameters window.

The Employee Name list of values displays applicant and employee names. You can print future-dated RPAs for applicants if the person is an applicant as of the system date, and you are using a responsibility that has a security profile set to View Applicants: ALL.

4. Choose the Submit button.

#### **To print a current RPA:**

1. Locate an RPA on the Worklist and open the Notification.
2. Open the RPA by double-clicking the Request for Personnel Action icon.
3. Print the RPA by choosing the Print icon from the toolbar.
4. Select Request for Personnel Action.
5. Select a printer, and choose the OK button.

**To print an updated or cancelled RPA:**

1. Locate the RPA on the Worklist.  
If necessary, use the Find Notifications dialog to display all updated and cancelled actions.
2. Open the RPA by double-clicking the Request for Personnel Action icon.
3. Print the RPA by choosing the Print icon from the toolbar.
4. Select Request for Personnel Action.
5. Select a printer and choose the OK button.

## Printing the Notification of Personnel Action

You print the Notification of Personnel Action for employees within your security profile using a postscript printer after the RPA successfully passes the required edits and the application updates the database.

**To print the NPA automatically:**

1. Select Update to HR from the Routing dialog box.
2. Select Print Notification.
3. Select a printer.
4. Choose OK.

**To delay printing the NPA:**

1. Select Update to HR from the Routing dialog box.
2. Deselect Print Notification.
3. Choose OK.
4. When you are ready to print the NPA, print it from the Concurrent Manager or from an updated RPA.

**To print a single NPA from the Concurrent Manager:**

1. Display the Submit Requests window.
2. In the Name field, select Notification of Personnel Action.
3. Enter the Employee Name in the Parameters window.
4. If you wish to have the application print the back page of the NPA, choose Yes.
5. Choose the Submit button.

**To print a batch of NPAs from the Concurrent Manager:**

1. Display the Submit Requests window.
2. In the Name field, select Batch Print Notification of Personnel Action.
3. Enter print criteria in one or more of the following fields:
  - Employee Name

- NOA Code: application prints NPAs that correspond to the specified Nature of Action Code
- POI: application prints NPAs with the specified Personnel Office Identifier
- Organization Group: application prints NPAs for the employees in those organizations whose names include the text you enter in this field

The Organization Group and Organization fields are mutually exclusive. You enter information in one or the other.

Use Organization Group to print NPAs for more than one organization in a business group. For example, if you defined organization names with regional designations such as Northeast Office and Southeast Office, you could print NPAs for employees located in these organization by entering east in the Organization Group.

**Note:** The application locates the NPAs for any organization whose name contains the text entered in Organization Group. To retrieve NPAs for the relevant organizations, make sure that you enter text found only in the names of the organizations that you wish to query.

- Organization: application prints NPAs where the position's organization is the same the one entered in this field
- The Organization Group and Organization fields are mutually exclusive. You enter information in one or the other.
- Reprint Printed RPAs: application prints notifications that have been previously printed. Select No to avoid printing them.
  - Back Page: application prints the back page if you enter Yes
  - From Effective Date: application prints those NPAs with an effective date that falls on or before the specified end date
  - To Effective Date: application prints those NPAs with an effective date that falls on or before the specified end date
  - From Approval Date: application prints those NPAs with an approval date that occurs on or before the specified end date
  - To Approval Date: application prints those NPAs with an approval date that occurs on or before the specified end date

4. Choose the Submit button.

The application prints the NPAs in alphabetical order by employee Last Name.

**Note:** Last names in the application are listed alphabetically and by case. For example, the last name "Young" precedes the last name "Arlen."

# Future, Retroactive, Cancel, Correction Actions

## Retroactive and Future Actions

When you initiate an RPA for someone, the application displays a list of *pending* actions (actions that have not yet been approved for that person). By reviewing the RPAs, you can determine whether pending actions affect the one that you are processing.

When you initiate a correction or cancellation that has a future or retroactive effective date, the application displays a list of *approved* RPAs. By reviewing the RPAs, you can determine whether these actions need to be cancelled or corrected.

The Approved Request for Personnel Actions window lists the approved actions for each person you query, including:

- All future RPAs that have been approved
- Notification of Personnel Actions that have an effective date later than the one you are correcting or canceling
- Notification of Personnel Actions where the Nature of Action is the second Nature of Action of a dual action

## Retroactive Actions

Retroactive actions allow you to make necessary adjustments to an employee's record. They are processed the same as other actions, with the exception that the effective date of a retroactive action is earlier than the current date. When the action is approved and submitted as an update to HR, the application performs the usual CPDF edits.

If you rehire an ex-employee and need to change that person's record, it is recommended that you process an RPA based on the current Appointment, and not a retroactive action for the previous Appointment. For information about retroactive actions and corrections to intervening actions, refer to Processing Retroactive Actions, page 3-33, and Canceling or Correcting an RPA, page 3-34.

## Future Actions

HR Managers and Administrators often prepare RPA transactions in advance, for example, in expectation of a mass pay adjustment based on newly released pay table updates. A future action is an RPA that has an effective date later than the current date. In practice, it is usually an action with an effective date later than current pay period.

You process future actions the same as any other Nature of Action, with the exception that you set the effective date later than the current date. You initiate a future action, route it, approve it, and update it to HR. When the application runs the Process Future Dated RPA concurrent process (based on the frequency established by your system administrator), the application identifies the actions due for update, performs the necessary CPDF edits and updates the actions to the HR database.

See: Scheduling Future Dated RPA Actions, page 3-32

At the time of update, the application routes any pending RPAs for the employee to the person who submitted the actions for update. This person can then review the RPAs and take appropriate action, Correcting, Canceling, or resubmitting the RPAs for update.

If multiple actions occur on the same future effective date for an employee, the application processes the NOAC with the highest priority and returns the other NOACs to the person who submitted the action for update for review and possible Cancellation or Correction.

After the application updates the database with that day's actions, you can print the Notification of Personnel Action from the Concurrent Manager.

See: Printing the Notification, page 3-25

## Correction Actions

If the Servicing Personnel Office determines that information on a Notification of Personnel Action is inaccurate or an action is invalid or improper, the Personnelist can issue a Correction. The Approved Requests folder lists the original RPA, Correction, and Cancellation actions performed against it, and the NOAC order in which the RPAs were processed.

When you process a Correction, you can update any editable field, including an employee's first, middle, and last names as well as their Social Security Number and Date of Birth. It is recommended that you use the Correction personnel action to change data items for an employee's Person, Assignment, or Position record rather than enter manual changes in the Person, Assignment or Position windows. When you update the RPA action to the HR database, the application updates the employee's record and maintains a history of those changes.

## Retroactive and Intervening Corrections

When you process a Correction to an action, the application uses the To Side position information of the most recent NPA. The application uses the From Side only when the NPA is a Cancellation of an Award, Separation, or Non Pay Duty Status action.

If several intervening RPAs have the same effective date, you can refer to the NOAC Process Order number in the Approved Requests for Personnel Action window to determine the sequence in which to Cancel or Correct the RPAs.

**Note:** If you have several intervening actions with the same effective date, the element displays the most recent updated value. The application only changes the element when the final intervening action is updated, not for the ones with lower process order numbers.

Position data that you change manually in the Position window is not considered a retroactive change. To include those data item changes in an action, Cancel the original RPA and process a new action.

## Processing Future Actions

You can process actions with future effective dates to prepare RPAs in advance. A future action is an RPA that has an effective date later than the current date. In practice, it is usually an action with an effective date later than current pay period.

Use the Submit Requests window.

**To process a future action:**

1. Initiate an action and enter an effective date later than the current date.

Until you enter an effective date, the application populates the RPA with information based on the current date. Prior to entering the effective date, you can view information for a later or earlier date by date tracking the RPA.

2. Process the action as you would any other RPA completing, approving, and updating the action.

See: Processing a Request for Personnel Action, page 3-15

When the application runs the Process Future Dated RPA concurrent process for the action's effective date, the application reapplies CPDF edits to validate the information contained in the RPA. After the application updates the database with that day's actions, you can print the Notification of Personnel Action from the Concurrent Manager

See: Setting the Frequency for Processing Future Dated Actions, page 3-32

## Scheduling Future Dated RPA Actions

To have the application process future-dated RPAs, you specify how often the application retrieves and updates to the database those RPAs that have reached the effective date. For example, you might schedule the process to run nightly, and the application would update those RPAs effective that day.

The number of transactions due for update on a given day may run into the thousands, for example for a mass salary update. To improve the performance and expedite the number of transactions run, you can specify the number of batches to run simultaneously (number of threads), and the number of transactions in each batch (batch size).

The responsibility you choose when logging onto the application determines what reports you can run. When you setting up the process, log in using a:

- Secure view responsibility to run future-dated RPAs created in that secure view responsibility

The application retrieves those RPA records where the business group ID of your current login matches the business group ID of the RPA originator's login.

- Non-secure responsibility to run all future-dated RPAs

If you have set up cross-business group functionality, the process runs for RPAs in all business groups. Otherwise, it runs for RPAs in your current login's business group.

Use the Submit Requests window.

**To schedule the process for updating future dated actions:**

1. In the Name field, select Process Future Dated RPAs from the list of values.
2. In the Parameters field, enter the:

- Personnel Office ID

By specifying the POI, you limit the RPAs processed to those administered by that personnel office.

- Batch Size, the number of transactions in each batch



The default batch size is 1000.

- No. of Threads, the number of batches to run simultaneously

The default number of threads is 10.

3. To define a schedule, set the Run the Job options to run a request as soon as possible, at a specific time, or repeatedly at specific intervals.
4. Specify the Completion Options.
5. Choose the Submit button.

If multiple actions occur on the same future effective date for an employee, the application processes the NOAC with the highest priority and returns the other NOACs to the person who submitted the action for update. The recipient can then review, and if necessary process a Cancellation or Correction action.

When the application processes the actions that are effective for that day, the application reapplies CPDF edits to validate the information contained in the RPA. To account for any system down-time, the application also updates any actions with earlier effective dates that might have been skipped when the system was off-line.

If you have multiple POIs, you can repeat these steps to set up a processing schedule for each appropriate POI.

## Processing Retroactive Actions

Retroactive actions allow you to make adjustments to an employee's record that occur earlier than the current date.

**Note:** For rehired ex-employees, do not process retroactive actions to change the person's record. Instead process an RPA based on the current Appointment. See Rehiring an Ex-Employee, page 1-19

### To process a retroactive action:

1. Initiate an action and enter an effective date earlier than the current date.

The application populates the RPA with information based on the current date until you enter the effective date. Prior to entering the effective date, you can view information for an earlier date by datetracking the RPA.

2. Process the action as you would any other RPA completing, approving, and updating the action.

When the action is approved and submitted as an update to HR, the application performs the usual CPDF edits.

For retroactive action in which you select and then update information about an employee, the application informs you if the employee has intervening action. You may need to review and subsequently Cancel or Correct these actions depending on the purpose or details included in the retroactive personnel action.

For information on processing retroactive and intervening correction actions, see Correcting an NPA, page 3-36.

## Canceling an NPA

If the Servicing Personnel Office determines that information on a Notification of Personnel Action is inaccurate or an action is invalid or improper, the Personnelist can issue a Cancellation. The Approved Requests folder lists the original RPA, Correction, and Cancellation actions performed against it, and the NOAC order in which the RPAs were processed.

If you Cancel a *non-Appointment* action, the application Cancels the action and any Corrections made to it. If you Cancel an *Appointment* action, the application automatically Cancels all subsequent Approved personnel actions and Corrections and generates an NPA for the starting original action. The application does not generate NPAs for the subsequent actions, but marks them as Canceled so that they are no longer listed in the Approved Requests for Personnel Action window. As a reminder, if you do Cancel an Appointment action, delete any pending RPA's for that person. (Open a pending RPA from your Workflow worklist and remove the employee's name, then delete the RPA.)

### To cancel an NPA:

1. Select Cancellation/Correction from the Navigator.
2. In the Find window, enter query criteria for the Name or Social Security.  
  
You see a list of Approved and future actions. A processed status indicates the action has been Approved and updated to the HR database; a pending status indicates a future action.
3. In the Personnel Actions region, click Completed, Pending, or All to specify the type of actions that you wish to view for that employee.
4. From the Approved Requests for Personnel Action window, select the Notification of Personnel Action you want to Cancel. You can only process RPAs for which you are part of the original routing group.

**Note:** If you are canceling dual actions, you must process a separate RPA for each action. The second action is listed below the first with the number 2 next to it.

5. Choose the Cancellation button.

The RPA opens with the Cancellation Nature of Action entered. Because the Nature of Action is to withdraw the action, you cannot change the Nature of Action family or the data in the form.

6. Route, approve, and submit the RPA for update as you would other RPAs.

**Note:** When you close the Cancellation action, the application places it in your Workflow Worklist where you can continue to work on it. If you delete the Cancellation action before approving and updating it to the database, the application restores the original approved action to the Approved Requests for Personnel Action window.

## Canceling or Correcting Future Approved Actions

The application lists future approved actions in the Approved Requests for Personnel Action window. This window lists the approved actions for each person queried, including:

- All-future approved RPAs
- NPAs that have an effective date later than the one that you are canceling or correcting
- NPAs where the NOAC is the second NOAC of a dual action.

See: Processing Future Actions, page 3-31

### **Canceling Approved Future Actions**

Use the Approved Requests for Personnel Action window.

#### **To cancel an approved future action:**

1. Select Cancellation/Correction from the Navigator.  
The Approved Requests for Personnel Action window appears.
2. Query the future action you want to cancel by entering the query criteria in the Name or Social Security field.  
You see a list of approved and future actions. A pending status indicates a future action.
3. From the Approved Requests for Personnel Action window, select the future RPA that you want to cancel.
4. Choose the Reroute button to reroute the RPA to the person who submitted the RPA for Update to HR.  
Cancellation and Correction actions remain in the action's original routing group.
5. To cancel the RPA, the person who submitted the RPA for update can route the RPA to the Approver for cancellation. (The Approver opens the RPA and deletes it by choosing the Delete Record icon from the toolbar.)  
The action is listed as cancelled in the History for that action.

### **Correcting Approved Future Actions**

Use the Approved Requests for Personnel Action window.

#### **To correct an approved future action:**

1. Select Cancellation/Correction from the Navigator.  
The Approved Requests for Personnel Action window appears.
2. Query the future RPA you want to correct by entering the query criteria in the Name or Social Security field.  
You see a list of approved and future actions. A pending status indicates a future action.
3. From the Approved Requests for Personnel Action window, select the future RPA that you want to correct.
4. Choose the Reroute button to reroute the RPA to the person who submitted the RPA for update.
5. The person who submitted the RPA for update can correct the action, route it to the Approver for approval, and submit the Correction for Update to HR.

## Correcting an NPA

When you process a Correction, you can update any editable field, including an employee's first, middle, and last names as well as their Social Security Number and Date of Birth.

**Note:** You should process any Name Change Corrections (not Cancellation) against the original RPA where the name was entered in error, usually an Appointment or a Name Change action

### To correct a Notification of Personnel Action:

1. Select Cancellation/Correction from the Navigator.
2. In the Find window enter query criteria for the Name or Social Security.
3. In the Personnel Actions region, click Completed, Pending, or All to specify the type of actions that you wish to view for that employee.
4. From the Approved Requests for Personnel Action window, select the Notification of Personnel Action that you want to correct.
  - If the Corrections are hidden from view, choose the Show Corrections button to list them.
  - If you are Correcting dual actions, you must process a separate RPA for each action. The second action is listed below the first with the number 2 next to it.
5. Choose the Correction button.
6. An RPA window opens with the Correction Nature of Action displayed. Enter the data that you wish to correct in the appropriate field.

When you create a Correction action, the application populates the From Position side details with the Position information from the original RPA.

If you are correcting an intervening action, the application retrieves the From Position side data from the most recent retroactive RPA. If the most recent retroactive RPA is a Cancellation action, the application uses the RPA that preceded the Cancellation.

When you process the Correction, you can also review and change the extra information details. The application displays the RPA extra information values entered in the original RPA's extra information, and then refreshes the RPA's extra information with the Position, Assignment, and Position extra information based on the RPA's effective date. You can change the extra information, including replacing previously updated data with a null (blank) value.

7. Complete and route the RPA, following the usual steps for processing an RPA within the Personnel Office.

If you close the Correction action, the system places it in your Workflow Worklist where you can continue to work on it.

If you delete the Correction action before approving and updating it to the database, the application restores the original action to the Approved Requests for Personnel Action window.

Upon update, the application enters the corrections in the appropriate records for the effective date of the original action. The application creates a Remark noting that the item is corrected, and generates a Notification of Personnel action that you can

then print. The printed Notification contains all the information contained in the NPA as well as the corrected data items.

**Insertion Data**

If you are Correcting an action that has insertion data in the NOAC description, such as an NTE date, you cannot correct this information. If necessary, cancel the action and reprocess it.

## Other RPA Actions

### Retained Grade Actions

To have the application calculate pay using Retained Grade information, you must complete the US Federal Retained Grade Person Extra Information before updating an action to the HR database.

You can enter more than one Retained Grade record for an employee. When calculating pay, the application uses the active record. The application identifies the active records where the To Date has not been reached and chooses the one with the earliest From Date. For example, in the table below, if you are processing an action with an effective date of September 1, 2003, the application would use the first retained grade record since its start date of January 1, 2003 is earlier than the second record's start date of June 1, 2003.

#### *Example dates for processing an action*

From Date	To Date
1 - Jan-03	31 - Dec-04
1 - Jun-03	31 - May-05

If you later change a person's Retained Grade extra information (Retained Pay Plan, Grade, and Pay Basis), the application recalculates the employee's pay upon update to the HR database.

**Tip:** When you then process an RPA for someone who has a Retained Grade record, it is recommended that you enter the Effective Date before selecting the person's name. Entering the effective date first ensures that the application retrieves the appropriate retained grade details.

### Pay Tables and Retained Grade

Every position has a pay plan and pay table ID. Pay calculations performed for an employee on Retained Grade access the Retained Grade pay table ID, not the position's pay table ID. Similarly, the application calculates pay using the retained pay plan and grade, not the position's pay plan and grade.

When you construct pay tables, confirm whether anyone is on Retained Grade. If so, create Retained Grade pay tables and maintain them until you no longer expect to place anyone on them. When the new pay tables are released, make sure that you update the Retained Grade pay tables.

### Retained Grades and Pay Basis Formats

If an employee is on Retained Grade with a Pay Rate Determinant (PRD) of A, B, E, F, U, or V, the pay fields on the RPA reflect the Retained Grade Pay Basis.

For some employees, the pay basis of the Retained Grade is not the same as their occupied position. For example, an employee might have a mixed pay basis with a per annum pay basis for their retained grade and a per hour pay basis for their position. To make the salary formats commensurable, the application displays the To and From pay amounts in the Retained Grade pay basis.

## First Action Following Update 34 Installation

If you are implementing Oracle US Federal HRMS and you have legacy employees or you are updating your current installation with the Update 34 changes, the following condition applies. For the first action you process for an employee who occupies a retained grade, the From salary information on the RPA displays the occupied position's pay basis and the To salary information displays the retained grade pay basis.

If the occupied and the retained grade pay basis are not the same, the application inserts Remark AAA. This Remark explains that although the salary amount formats are different, the employee's salary remains the same.

All subsequent actions processed with effective dates later than the updated first action display the To and From Salary amounts in the retained grade pay basis.

## Temporary Promotion Retained Grade

You can temporarily promote an employee who occupies a retained grade record by processing a NOAC 703 Promotion NTE. When you process a NOAC 703, you enter the Temporary Promotion Step and the Date WGI Due in the RPA Extra Information. Upon update to HR database, the application:

- End dates the active retained grade record
- Creates a new retained grade record with the same values as the previous record as well as the Temporary Promotion Step
- Updates the WGI Due date information in the WGI element
- Records the step information in the Person Federal Retained Grade extra information
- Displays the Temporary Promotion Step in the RPA and NPA reports

Employees who are temporarily promoted while on retained grade are eligible for Within Grade Increases, QSIs, and pay adjustments. The salary computation is based on the details of the temporary promotion, not the retained grade.

## Termination Retained Grade

When you first put someone on Retained Grade by processing a NOAC 740 Position Change, you enter the Retained Grade record. The application stores this information in the US Federal Retained Grade Person Extra Information. When you process an Automatic Within Grade Increase for the employee on Retained Grade, the system automatically increases the Retained Step.

When you create a retained grade record, the application end dates the record two years after the record's start date. For example, if the Date From is 10-January-2003, the Date To is set to 10-January-2005. If your agency practices require a two year minus one day interval, you can manually enter a different Date To, such as 09-January-2005.

To keep your changes synchronized, when you:

- Create or update a retained grade, date track to the retained grade record's start date.
- Terminate a retained grade, enter the effective date before you select the employee so that you can view the records that are active as of the effective date.

## Termination of Retained Grade Records

You can terminate a retained grade or a Temporary Promotion while on retained grade by processing a single RPA using one of the following NOACs:

- 702 Promotion
- 740 Position Change
- 866 Termination of Retained Grade

The application displays the retained grade information in the RPA Extra Information (US Fed Termination of Retained Grade). If you are processing a:

- NOAC 702 action, the application lists all the retained grades to be terminated
- NOAC 740, the application lists all the retained grades and you can terminate one or more of them

A promotion removes an employee from retained grade, so upon update to the HR database, the application automatically terminates all retained grade records. The application end dates the retained grade records one day prior to the RPA effective date. If the employee was on a Temporary Promotion, the 702 action terminates the retained grade as well as the Temporary Promotion and promotes the employee to the current position.

You select each retained grade record and enter a yes (Y) to terminate or a no (N) to continue the retained grade. Upon update, the application terminates the records you specified as yes (Y). It end dates the retained grade record one day prior to the RPA effective date.

- NOAC 866, the application lists the active retained grade

Upon update, the application terminates the retained grade, end dates the record as of the RPA effective date, and updates the new salary amounts on the day after the RPA effective date.

If the employee has more than one retained grade record, the application places the employee on the next active record (the one with earliest From Date that has not yet reached its To Date.) If the employee is also on Temporary Promotion, when you process the 866 action, you can keep the same step or change it in the RPA extra information. Upon update to HR, the application includes this Temporary Promotion step information in the active record.

You can terminate all active records by processing a NOAC 866 for each one as long as the PRD is other than 0 or 6.

### Processing Corrections

You cannot correct the Retained Grade records terminated by the original action, such as a NOAC 740 or 866 but you can choose new or active records. If you need to change the originally terminated Retained Grade record, cancel the action that terminated the record and process a new action.

## Change in Hours, Work Schedules, or Duty Station

The application maintains position-related Work Schedule, Part-Time hours, and Duty Station information in the Assignment and Position Extra Information. You can change this information when you process an RPA, such as a Return to Duty that involves a Change in Work Schedule.

When you process an RPA and choose a new To Position, the application populates the RPA with the To Position's Work Schedule, Part-Time Hours, and Duty Station information as of the RPA's effective date. If you choose a new work schedule or Duty



Station and update the RPA, the application enters the same value in the Assignment and Position record to ensure that the records have identical values.

## Part-Time Indicator

If you enter a part-time indicator when processing a Change in Work Schedule or Change in Hours, the application enters that value.

When you process a Change in Work Schedule (NOAC 781) or a Change in Hours (NOAC 782), the application updates the value of the part-time indicator in the Assignment Non-RPA Extra Information when it updates the action to the HR database.

If the work schedule is B, F, G, I, or J, the application updates the part-time indicator with a null (blank) value. If the work schedule is P, Q, S, or T, the application updates the part-time indicator with the value that you entered in the RPA Extra Information.

## Processing Not to Exceed Actions

You can process RPA actions that involve Not To Exceed (NTE) Dates. The dates you enter in the RPA are for record purposes only. When an NTE date is reached, you must initiate an RPA to terminate a temporary person.

### To enter NTE dates:

1. Enter the dates in a Nature of Action description or Remark text.

After an RPA has been approved and has successfully been updated, the application populates the Assignment NTE Extra Information with the new dates.

If the action changes the employee's assignment status so that the NTE date no longer applies, upon update the application automatically nulls (clears) the date from the Assignment NTE Extra Information.

## Processing Name Change Actions

Most name changes involve a change to the person's last name. For this reason, when you process a Name Change RPA, the application does not supply a List of Values for the last name field. You can also change an employee's first and middle names using a Name Change RPA.

### Changing an Employee's Name

Use the Requests for Personnel Action window.

### To change an employee's name:

1. Choose Name Change from Change Actions listed on the Navigator menu.
2. Enter the social security number for the person whose name you want to change.

The application displays the first, middle, and last name of the person.

**Note:** If you choose the social security number after entering the person's full name, the application replaces the name with the name values stored for that social security number. Re-enter the new first, middle, and last names.

3. Enter the person's last name. If appropriate, change the person's first and middle names.
4. Complete the RPA, following the usual steps for processing an action.

When the application updates the database, it updates the person's entire name as entered on the RPA (first, middle, and last name).

**Note:** The name shown in the Employee field at the top of the RPA does not change until the RPA is updated to the database.

### **Correcting an Employee's Name**

Use the Approved Requests for Personnel Action window.

#### **To correct an employee's name:**

1. Select Cancellation/Correction from the Navigator.  
The Approved Requests for Personnel Action window appears.
2. Enter query criteria for the Name or Social Security.
3. From the Approved Requests for Personnel Action window, select the Notification of Personnel Action that you want to correct.

**Note:** If you are correcting dual actions, you must process a separate RPA for each action. The second action is listed below the first with the number 2 next to it.

4. Choose the Correction button.
5. An RPA window opens with the correction Nature of Action displayed. The information in Part A is retained, but the remainder of the form is not populated. Enter the data that you wish to correct in the appropriate field.
6. Complete and route the RPA, following the usual steps for processing an RPA within the Personnel Office.

Upon update, the application enters the corrections in the appropriate records for the effective date of the original action. The application creates a Remark noting that the item is corrected, and generates a Notification of Personnel action that you can then print. See: Printing Notifications, page 3-25.

## **Processing Conversion Actions**

You can process Conversion to Appointment actions using an RPA.

#### **To enter Conversion Dates in an RPA for Conversion:**

1. Initiate a Conversion to Appointment action.
2. Enter the date on which the conversion occurs in the Conversion Date segment of the RPA Extra Information.

Upon update to the HR database, the application replaces existing Conversion dates in the Person US Fed Conversions Extra Information with the new ones from the RPA.

**Note:** If you did not enter a Conversion Date, the application clears the Conversion Date field .

### **Correcting Conversion Actions**

When you process a Correction action, you cannot replace existing data with a null (empty) value. However, after updating the Correction to the HR database, you can navigate to the Person US Fed Conversion Extra Information and remove the data there.

### **Conversion of Ex-Employee**

If you decide to rehire an ex-employee, you can process Appointment and conversion personnel actions for that person. See: Rehiring an Ex-Employee, page 1-19

## **Verifying or Changing FEGLI Codes**

The two-character Federal Employee Group Life Insurance (FEGLI) codes replace the existing codes as of April 25, 1999. The two-character FEGLI code is displayed on the employee's RPA, Element Entry window after update to HR, on the printed NPA, and within the CPDF Status report.

If you process a retroactive personnel action with an Effective Date prior to April 25, 1999, and on update to the HR database the application notifies you that the FEGLI code may have changed, you may need to change the employee's element record.

### **To verify or change the FEGLI code:**

1. Display the employee's Element Entry window.
2. Datetrack the Element Entry window to April 25, 1999. You can only change the FEGLI code if you are datetracked to April 25, 1999.
3. Verify that the FEGLI code is valid for that date. If necessary, change it.
4. Save the record.



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# Workforce Management Mass Actions

## Workforce Management Mass Actions Overview

When you have a large number of employees affected by the same personnel action, such as an annual pay adjustment, you may find it easier and more efficient to process a mass action.

You can process:

- Mass Salary change actions, *Oracle HRMS Compensation and Benefits Management Guide*, including standard pay or percent pay adjustments, locality adjustments
- Mass pay table, *Oracle HRMS Compensation and Benefits Guide* updates for special rate tables
- Mass Awards, *Oracle HRMS Compensation and Benefits Management Guide*
- Mass Transfer In and Out actions, page 4-11
- Mass Realignments, page 4-15
- Retention Register, page 4-17

The application processes step increases automatically for you, including Automatic Within Grade Increases (WGI) and Quality Step Increases (QSI). The default automatic WGI requires no response by the Personnel Office. The process searches for employees eligible for a WGI, generates RPAs for each employee entitled to the WGI, notifies the Personnel Office of the WGI approval, updates the employee records on the effective date, and generates Notification of Personnel Actions (NPAs).

See: Automatic Within Grade Increases (WGIs), *Oracle HRM Compensation and Benefits Management Guide*

When you process a mass action, you can specify the selection criteria as well as the data that you wish to change. You can preview your results and continue to adjust the data until you are ready to execute the action.

The mass actions have two windows, a Preview and Final window. You can process a mass action entirely from the Final window, or work with the Preview and then the Final window. The windows are identical with the exception that the final window contains an Execute button for running the final process. You might use both windows in your agency for security reasons to limit the number of people who can run the final process.

The following sections provide a more detailed description of the mass action process.

## Security

The application supports secure user and cross-business group functionality. When you create a mass action, the application filters the Selection Criteria list for organizations, positions, and hierarchies. It also filters the information that you view and update in the Preview window and for the Final execution.

When you first save a mass action, the application stores the business group ID attached to your login's responsibility with the mass action record. The application then limits access to users whose business group login corresponds to the one saved with the mass action.

**Note:** The name you assign a mass action is unique. Once you save an action with that name, you cannot use it again in any business group.

There are two exceptions to these general guidelines. The HR: Cross Business group setting does *not* apply to Mass Realignment or Mass Transfers.

- **Mass Realignment:** The application restricts the Selection Criteria and the results displayed in the Preview and Final windows to your login responsibility's business group.
- **Mass Transfers:** Initially, you can view the entire list of *unsaved* Mass Transfer Outs when processing a Mass Transfer In across business groups. As soon as you save the Mass Transfer In action, the application stores the business group associated to your login responsibility. Only users with the same business group can then access that action.

**Note:** If you require access to all mass actions and to run related reports, use a non-secure responsibility.

See: Secure User Support for US Federal HR, *Configuring, Reporting, and System Administration Guide*

## Eligibility Criteria

You determine which employees are affected by a mass action by entering source eligibility criteria in the mass action window. The application then uses the eligibility criteria to retrieve employees from the database that should be included in the action.

In addition to defining source criteria, you also enter data that applies to all eligible employees, such as the target organization when you realign or transfer employees. Based on this criteria, the Preview window lists the employees who are eligible as of the effective date or the current date, if you have not yet entered an effective date. The application also lists vacant positions (realignments and transfers).

The target data that you enter in the mass action window applies to all selected employees; however, you can override the target data for an individual employee or position record. For example, in a realignment, you can change the target position details for an individual employee.

When you save the Preview, the application stores the criteria name and the employee's selection status on the Person Mass Action Extra Information (Mass Salary and Transfer In) or the Position Mass Action Extra Information (Realignment and Transfer Out).

After saving the criteria, you can review the criteria and its run results by performing a standard query or printing reports. If the Status field is Unprocessed or Error, you can continue to make necessary changes and save your results.

**Note:** If you need to process a group of employees separately, such as those employees who require different Legal Authority Codes, you can create a second Preview using different selection criteria, as explained in *Deselecting Employees for Mass Actions*, page 4-1 .

## Run Results Preview Folder

You can use the folder tool to customize the view of the folder in which you're viewing the run results. Insert columns when you want to consider additional data elements to assist in evaluating employee eligibility.

For example, you might add a column for the last name in the Transfer In window to more easily locate the employees whose actions you want to process. Or on a Transfer Out, you might add a column to display Not to Exceed dates to identify temporary employees.

In addition, the product includes 20 columns that you can use for adding columns for agency data. You can change column titles using custom windows, and populate the columns with agency data using agency hooks.

**Note:** The application does not include this additional data in the RPA or in the Interface table for Mass Transfer Out actions.

## Deselecting Employees for Mass Actions

From the Preview window, you can deselect employees you want to exclude from the mass action, and enter a reason for their elimination in the comments field.

You can only select an employee once for a specific mass action. If you create a new Preview using the same eligibility source criteria, the application automatically deselects the employees and lists the Criteria Name where you selected that person.

## Processing Separate Groups of Employees

When processing mass actions, you can separate employees according to different target criteria. For example, if you are realigning employees from Department A to two target agencies, Agency C and Agency D, you can set up two sets of criteria. When you preview the list of eligible employees using Agency C's criteria, the application selects all the eligible employees from Department A. You can then deselect employees you want to exclude. When you view the list of eligible employees using Agency D's criteria, the application lists Department A's employees, and deselects those employees selected based on Agency C's criteria.

As a convenience, you can print reports showing selected or deselected employees until you execute the action.

## Remarks and Legal Authority Codes

The product includes predefined Remarks and Legal Authority Codes that you can choose from the list of values. You can also enter free-form Remarks.

The Remarks and Codes that you enter in the Legal Authority Codes and Remarks window apply to all employees selected for the mass action. You cannot change them for an individual employee.

## Final Mass Action

You can run the final mass action from the Final mass action window or the Concurrent Manager.

In both cases, when the effective date is reached, the application:

- Selects eligible employees
- Creates RPAs
- Enters the Approving Official's name, working title, and approval date

The Approving Official is the employee you entered in the Personnel Officer Identifiers window.

- If the action is a Mass Transfer Out, generates the final Interface table

After successfully updating the mass action, the next time the Process Future Dated RPA concurrent manager process runs, the application updates the actions to the database with the appropriate information.

**Note:** The Process Future Action Dated RPA process updates all current, retroactive and future dated actions that have reached their effective date. The only exception is Mass Awards where the application immediately updates Mass Award actions that have a current or retroactive date.

## Status of Mass Actions

The application changes the Status field on the mass action window to reflect the phase of the process. When you run the final process, the Status field changes from Unprocessed to Submitted. When the application updates the mass action to the database, the status changes to Processed.

If an error occurs during Preview or any stage of the final run process, the application changes the Status to Error and enters the error message text in the Process Errors Log.

See: Error Handling, page 4-6

## Printed Mass Action Reports

Print reports to review the run results and to generate the appropriate Notifications.

*Before* you execute the mass action, you can print:

- Preview report for a list of employees selected in the criteria
- Deselection report for a list of employees deselected from the criteria

*After* the application updates the RPAs to the database, you can print the Notification of Personnel Action as a:

- List form notice that includes all employees selected for the mass action (Listing of All) or only one employee (Listing for Employee)
- Standard NPA (Notification of Personnel Action SF-50) for one employee



## Workforce Management Mass Actions

When you have a large number of employees affected by the same personnel action, such as an annual pay adjustment, you may find it easier and more efficient to process a mass action.

### What kinds of mass actions does the Oracle Federal Human Resources product support?

The product provides the capability to automatically process Within Grade Increases. Additionally, you can process mass actions for:

- Mass Salary
- Mass Realignment
- Mass Transfer In and Out
- Mass Awards

**Note:** You process single realignments, transfers, or salary adjustments in the usual way, by completing an RPA for that person.

### How does the product support Reduction in Force actions?

The product allows you to create, view, and print a retention register for use with Reduction in Force (RIF) actions.

# Mass Transfers and Realignment

## Error Handling

If the application displays a message notifying you of an error, it changes the Status field to Error. The Process Log Federal Maintenance Form displays the complete error message.

The log lists errors that occur when:

- You preview the run results
- You execute the final process

If there is a application error after you execute the final process, for example the system is off-line, the Status field on the Final form changes to Error. When the error has been corrected, the application restores the Submitted Status. You can resubmit the final process by choosing the Execute button.

- The application updates the mass action

If there is an error on a specific record when the application updates the mass action, for example, an RPA does not pass the CPDF edits, the application routes the RPA to the appropriate Personnel Office groupbox.

For example, if there's an error when the application updates a Realignment action, the application routes the RPA back to the losing Personnel Office groupbox, not the gaining office's groupbox.

If you are assigned to that groupbox, you can view the rejected RPAs sent to the groupbox inbox and correct and resubmit the RPA, or cancel the action.

**Note:** To have the application correctly route the information, make sure that you define a Personnel Office groupbox for the employees (Routing Group and Groupbox Federal Maintenance window), and associate the groupbox with a Personnel Office ID and an Approving Officer (Personnel Office ID Federal Maintenance window).

## Mass Transfers

When an Executive Order or directive requires a transfer of employees and positions, the losing and gaining agency can process mass transfer actions.

To prepare for the transfer in advance, the losing agency can print a report of selected employees or generate an Interface table. These reporting mechanisms allow the losing and gaining agency to discuss the transfer.

The printed list contains the selected employees' names, social security numbers, and their Agency From and To information. The Interface table contains further person and position details that the gaining agency can use to create and classify positions for the incoming employees.

## Processing Mass Actions

When you process a mass action, you can run the entire action from the Final mass action window, or work with the Preview and Final window. The windows are identical

with the exception that the final window contains an Execute button for running the final process.

Before you process a mass action, you must set up a groupbox, associate that groupbox to a Personnel Office ID, and assign an approving officer. This setup enables the application to enter the appropriate Approval information on the Notification, and to route errors and rejected actions to the Personnel Office groupbox responsible for correcting the action.

See: Maintaining Personnel Office ID Information, *Configuring, Reporting, and System Administration Guide*

This procedure covers the basic steps for processing Transfer Out actions, Salary Adjustments, Mass Awards, and Realignment as well as general information about mass actions. Refer to the following procedures for information unique to that mass action:

- Processing a Mass Standard Pay Adjustment, *Oracle HRMS Compensation and Benefits Management Guide*
- Processing a Mass Percent Pay Adjustment, *Oracle HRMS Compensation and Benefits Management Guide*
- Processing a Locality Adjustment, *Oracle HRMS Compensation and Benefits Management Guide*
- Processing a Mass Transfer Out, page 4-11
- Processing a Mass Transfer In, page 4-13
- Processing Mass Realignment, page 4-15

#### **To process a mass action:**

1. Display the mass action window.

In the Find window, choose New to create a new mass action or query an existing mass action.

See: Finding a Mass Salary Action, *Oracle HRMS Compensation and Benefits Management Guide*

2. Complete the eligibility criteria.

Enter a unique name, an effective date, and specify the appropriate selection criteria, including source and target information where applicable.

See: Setting Eligibility Criteria, page 4-1

The Status field indicates the phase of the process. The status is Unprocessed until you execute the action (Submitted) and the application creates an RPA (Processed). If there is an error in executing the action, the Status field changes to Error, as described in Error Handling, page 4-6.

3. Choose the LACs/Remarks button and choose the applicable Legal Authority Codes and Remarks from the list of values.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-8

4. Save your results.
5. Choose the Preview button to view the run results.

The application lists as selected all employees who are eligible as of the Effective Date. If you have not yet entered an Effective Date the application uses the current date. See: Setting Eligibility Criteria, page 4-1

6. Deselect the employees or vacant position (realignment) to exclude from the mass action.

You can select and deselect multiple records at a time.

- To select all the employee records, choose All from the Selection list. You can then manually deselect the records that you do not want the application to process.
- To deselect all the employee records, choose None from the Selection list. You can then manually select the records that you want the application to process.
- To have the application select a few records from the list of retrieved employee records, deselect the records you want processed. Choose Invert from the Selection list. The application selects the previously deselected records, and deselects the remaining records.

The application displays the comments field where you can enter a reason for excluding that person or position. See: Deselecting Employees from Mass Actions, page 4-1

7. Where necessary, change the default values for an employee record.

Most mass action Preview windows permit you to override some of the default target values. For example, for a realignment, you can override the duty station entered in the Position Details window with the appropriate one.

8. Save your results.

9. When you are ready to run the final results, choose the Execute button on the Final mass action window.

As an alternative, if you have prepared several actions in advance, you can execute the actions from the Concurrent Manager. See: Running the Final Action, page 4-9

If it is a current or retroactive action, the application immediately selects the employees based on the eligibility criteria, generates RPAs, and updates the database. If it is a future effective action, when the effective date is reached, the application selects the employees based on the eligibility criteria and generates approved RPAs. The Process Future Dated RPAs process updates the actions to the database.

If you decide not to execute a mass action, you can delete it, as explained in Deleting Invalid Mass Actions, page 4-11.

10. Print the required reports.

You can print a list Notifications of Personnel Action in either list or standard form. See: Printing Mass Action Reports, page 4-10

## Entering Remarks and Legal Authority Codes

You enter Remarks and Codes in the Legal Authority Codes and Remarks window. These Remarks and Codes apply to all employees selected for the mass action.

The product includes Remarks and Legal Authority Codes which you can choose from the List of Values. If the Code or Remark contains insertion data, the system displays a dialog box prompting you for that information. Enter the data and choose OK.

**To enter a free-form Remark in the Remarks field:**

1. Choose the ZZZ Remark to open a text entry field where you can enter the applicable text.

To edit the insertion data, position your cursor in the description field and enter the correct data. For information about adding agency Remarks or Legal Authority Codes, see *Nature of Action Maintenance Forms, Configuring, Reporting, and System Administration Guide*

**To change a Remark or Legal Authority Code:**

1. Replace it with a different one by choosing a new Remark from the List of Values. Or, delete it using the Delete icon on the toolbar.

**To enter different Remarks or Legal Authority Codes for a group of employees:**

1. Deselect the employees in the current Preview. and c
2. Create a new Preview using the same criteria.
3. Enter the appropriate Remarks and Legal Authority codes for this set of employees. See *Deselecting Employees for Mass Actions*, page 4-1

## Running the Final Mass Action

When you have completed the mass action and previewed the results, you can update the action to the database either from the Final mass action window or the Concurrent Manager.

If the action has a current or retroactive effective date, the application immediately updates the action to the database. If the action is for a future effective date, when the application runs the Process Future Dated RPA concurrent process for the action's effective date, the application reapplies CPDF edits to validate the information contained in the RPA. After the application updates the database with that day's actions, you can print the Notification of Personnel Action from the Concurrent Manager.

**Important:** Before running the final mass action, you must choose Preview at least once and save the Criteria.

**To run the final mass action from the form:**

1. Open the Final mass action window.
2. Choose the Execute button.

If you submit a final process by mistake, you can cancel the process prior to the effective date by querying the request in the Concurrent Requests Summary window and cancelling it there.

**To run the final mass action from the Concurrent Manager:**

1. In the Name field, select the mass action process: Process Mass Salary, Process Mass Realignment, Process Mass Transfer In, Process Mass Transfer Out.

You choose Process Mass Salary for all mass salary actions, including Standard Pay Adjustment, Percent Pay Adjustment, Locality Pay Adjustment.

2. In the Parameters window, select the mass action name (the name under which you entered and saved the action).
3. Choose the Submit button.

## Printing Mass Action Reports

Print reports to review the run results and to generate the appropriate Notifications.

You can print reports using the Print button on the toolbar, the Print menu option, or print a report from the Concurrent Manager. In general, you may find it easiest to locate all related reports and print them from the Concurrent Manager. For example, from the Concurrent Manager you can print a listing of selected employees, deselected employees, and Notifications.

### To print a mass action report from the Concurrent Manager:

1. In the Submit Processes and Reports window Name field, select the report name.
2. Enter the criteria name in the parameters field. If prompted, enter further parameter information to establish eligibility criteria.
3. Enter the number of copies you want the system to print.
4. Enter the printer you wish to use.
5. Choose the Submit button.

## Setting up a Workflow Administrator's Groupbox

If an error occurs when routing a Within Grade Increase, Position Description, or other personnel action, and the application does not find a designated groupbox, such as a Personnel Office groupbox, you receive a notification in the Workflow Administrator's groupbox.

The notification contains information including the RPA request ID, the supervisor name, and other details which you can use to correct the problem.

For example, if you have not defined the Personnel Office groupbox, you can enter that information or ask the appropriate person to correct it. Once you correct the problem, resubmit the notification (or abort it). When the notification is resubmitted, the application sends it to the Personnel Office or to the supervisor, depending on the preference set at implementation.

### To set up the administrator's groupbox:

1. Follow the procedure for setting up a groupbox.  
See: *Setting up Groupboxes, Configuring, Reporting, and System Administration Guide*
2. You must name the groupbox GHRWFADMIN.  
This groupbox name indicates to the system where it should send notifications.
3. Assign at least one user to the groupbox.

If you want to set up a different destination or use a different groupbox name, refer to the documentation that comes with Oracle Workflow for the post-install procedure.

## Deleting Invalid Mass Actions

You can delete Unprocessed mass actions that you have saved. (You cannot delete mass actions that have an Error or Processed status.) Deleting Unprocessed mass actions purges unwanted records from the database and allows you to reuse the mass action name.

Use the Mass Action Preview window.

### To delete an unprocessed mass action:

1. Query the mass action name and confirm that the status is unprocessed.
2. Place your cursor in the Name field and choose Delete from the Edit menu.
3. Choose Yes to delete the mass action from the decision dialog.

The application removes the data from the fields of the mass award action window.

4. Choose Save from the File menu to have the application update the database with the deletion.

## Processing a Mass Transfer Out

When you transfer employees and positions between agencies, the losing agency can process mass transfer actions using the Mass Transfer Out window.

To prepare in advance for the transfer, the losing agency can print a report of selected employees or generate an Interface table. These reporting mechanisms allow the losing and gaining agency to discuss the transfer.

### To process a Mass Transfer Out action:

1. Set up a groupbox, associate that groupbox to a Personnel Office ID, and assign an approving officer.

The application automatically routes notifications, errors, and rejected actions to the Personnel Office groupbox responsible for correcting the action.

See: Maintaining Personnel Office ID Information, *Configuring, Reporting, and System Administration Guide*

2. Display the Mass Transfer Out window.
3. Complete the eligibility criteria.

Enter a unique name, an effective date, and specify the appropriate selection criteria, including source and target information.

You can further reduce the selection based on:

- Organization: the application transfers all positions within the organization
- Organization and organization hierarchy: the application transfers all positions in the organization hierarchy, starting at the hierarchy level at which the organization is placed
- Position and position hierarchy: the application transfers all positions in the position hierarchy, starting at the hierarchy level at which the position is placed
- Additional Source Criteria, such as the Personnel Office ID and the occupational series.

4. Choose the LACs/Remarks button and choose the applicable Legal Authority Codes and Remarks from the List of Values.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-8

5. Save your results.
6. Choose the Preview button to view the run results.

The Preview window lists vacant and occupied positions as of the effective date, excluding employees whose approved and updated actions convert, reassign, or promote them to another agency prior to the effective date.

7. Deselect the employees to exclude from the mass action.

You can select and deselect multiple records at a time.

- To select all the employee records, choose All from the Selection list. You can then manually deselect the records that you do not want the application to process.
- To deselect all the employee records, choose None from the Selection list. You can then manually select the records that you want the application to process.
- To have the application select a few records from the list of retrieved employee records, deselect the records you want processed. Choose Invert from the Selection list. The application selects the previously deselected records, and deselects the remaining records.

The application displays the comments field where you can enter a reason for excluding that person or position. See: Deselecting Employees from Mass Actions, page 4-1

8. Where necessary, change the default value Agency Code Transfer To information, if it is not the same as the one entered in the mass action window.
9. Save your results.
10. When you are ready to run the final results, choose the Execute button on the Final Mass Transfer Out window.

**Note:** You can also run the final mass action from the Concurrent Manager by choosing Process Mass Transfer Out. See: Running the Final Action, page 4-9

When you choose the Execute button, the application generates an Interface table for the run results. The gaining agency uses the interface table.

See: Processing Mass Transfer In Actions, page 4-13

If an error occurs during the creation of the interface records, the application does not generate any RPAs. You must correct the data for the employee and position records reported in the Federal Process Log, or deselect those records, and then resubmit the Mass Transfer Out.

When you run the final process, the application:

- Selects the employees that meet the eligibility criteria, generates RPAs, and updates the database.

If the Mass Transfer has a future effective date, the application repeats the same process when the effective date is reached.



- End dates vacant positions and occupied positions selected for the transfer out
  - Creates a final interface table of occupied positions for the gaining agency (GHR\_INTERFACE, source type MASS TRANSFER)
  - Terminates employees, updating the appropriate Person and Assignment status and entering an end date for in the element records.
11. Print the required reports.

You can print a list form of all employees or individual Notifications of Personnel Action in either list or standard form. See: *Printing Mass Action Reports*, page 4-10

After you transfer an employee, you can process a Cancellation or Correction action for that person, but you may need to notify the gaining agency of the action.

## Processing a Mass Transfer In

When you process a Mass Transfer In (NOAC 132), you work with data generated by the Mass Transfer Out (NOAC 352) Interface table. After importing this data into your application, you can view and edit the employee and position data. You can also add new employee records to the existing data.

**Note:** If you do not import the data from the interface table, you can manually enter the information provided by the losing agency. When you save the Transfer In data, the application creates an Interface table for you.

When you execute the Mass Transfer In, the application submits the data for update to HR. Upon update the application generates the person records, hires the employees, and creates the assignment records.

### To process a Transfer In:

1. Set up a groupbox, associate that groupbox to a Personnel Office ID, and assign an approving officer.

This setup enables the application to enter the appropriate Approval information on the Notification, and route errors and rejected actions to the Personnel Office groupbox responsible for correcting the action.

See: *Maintaining Personnel Office ID Information, Configuring, Reporting, and System Administration Guide*

2. Set up your organizations, positions, and their associated hierarchies.

See: *Creating Organization Hierarchies, Enterprise and Workforce Management Guide*, *Creating Position Hierarchies, Enterprise and Workforce Management Guide*

3. Import the data from the interface table (GHR\_INTERFACE, source type MASS TRANSFER).
4. Display the Mass Transfer In window.
5. Enter the name in the Name field from the Interface table provided by the losing agency.
6. Enter an effective date for the Mass Transfer In that is at least one day after the Mass Transfer Out effective date.

7. Enter a description in the Reason field.
8. In the Employee Details section, set your view option. Choose
  - Select to list all employees, including those whose actions you've processed or whose records contain errors
  - Unselect to change the default setting for Preview so that all eligible employees listed in the Preview window are deselected
  - Include Errored Records to view only those records that contain errors
  - Override Previous Selection to re-select everyone that you deselected from other Previews.
9. The Employee Details section lists employees who match your selection criteria. Complete the data required to add the person to the agency, such as the Position Title, Step and Rate information, and Target Organization.

The status field shows whether the action is unprocessed (empty), processed (executed), or whether there's an error (error). You may encounter an error if:

  - You are manually entering employee data and enter invalid data
  - Have custom predefined data that the losing agency did not have and your business rules invalidate that data
  - Encounter an error produced by your import procedure of the interface data.
10. To view detailed data for an employee, select the person on the Mass Transfer In window and choose the Open button to display the Person Detail window. You can then view and edit the employee's data there.
11. Save your results.
12. Choose the applicable Legal Authority Codes and Remarks.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-8
13. When you are ready to run the final results, choose the Execute button on the Final Mass Transfer In window.

**Note:** You can also run the final mass action from the Concurrent Manager by choosing Process Mass Transfer In.. See: Running the Final Action, page 4-9

When the effective date is reached, the application creates the RPAs for Mass Transfer In (NOAC 132 ) for each person selected. The application generates the person records, hires the employees, and creates the assignment records. (If the Transfer In and Transfer Out agencies share the same database, the application rehires the employees.)

14. Print the required reports.

You can print a list form of all employees or individual Notifications of Personnel Action in either list or standard form. See: Printing Mass Action Reports, page 4-10

The application provides you with person, position, and assignment records. You can complete the process of adding the employees to your agency by following your usual procedures for adding new employees. For example, you might add them as users to the application, assign them to workflow routing groups, and so on.

## Processing Mass Realignments

You can process Mass Realignments when you need to update Organization details in one or more positions, such as OPM Organizational Component, Agency or Subelement codes, Office Symbol, or Organization Function Code. You can perform a Mass Realignment within the same agency or organization. When you process a Mass Realignment, the application retrieves all valid positions: those vacant and occupied positions that have a Hiring Status of Active or Proposed as of the effective date.

Use the Mass Realignment window.

### To process a Mass Realignment action:

1. Complete the selection criteria.

Enter a unique name, an effective date, and specify the appropriate selection criteria, including source and target information. You can set the selection at the organization or position level. Choose:

- Organization: the application realigns all positions within the organization
- Organization and organization hierarchy: the application realigns all positions in the organization hierarchy, starting at the hierarchy level at which the organization is placed
- Position and position hierarchy: the application realigns all positions in the position hierarchy, starting at the hierarchy level at which the position is placed

2. Save your results.

3. Click the Position Details button and enter the data that applies to the positions that you are realigning to the Target Organization.

4. Click the LACs/Remarks button and select the applicable Legal Authority Codes and Remarks from the list of values.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-8

5. Click the Preview button to view the run results.

The Preview window lists vacant and occupied positions as of the effective date, excluding employees whose approved and updated actions convert, reassign, or promote them to another agency prior to the effective date.

6. Deselect the employees or vacant position (realignment) to exclude from the mass action.

You can select and deselect multiple records at a time.

- To select all the employee records, choose All from the Selection list. You can then manually deselect the records that you do not want the application to process.
- To deselect all the employee records, choose None from the Selection list. You can then manually select the records that you want the application to process.
- To have the application select a few records from the list of retrieved employee records, deselect the records you want processed. Choose Invert from the Selection list. The application selects the previously deselected records, and deselects the remaining records.

The application displays the comments field where you can enter a reason for excluding that person or position. See: Deselecting Employees from Mass Actions, page 4-1

7. Save your results.
8. Where necessary, change the default target Position Details for an individual employee or position.
9. When you are ready to run the final results, click the Execute button on the Final Mass Realignment window.

**Note:** You can also run the final mass action from the Concurrent Manager by choosing Process Mass Realignment. See: Running the Final Action, page 4-9

When you run the final process, if the action is current or retroactive, the application selects the employees based on the eligibility criteria, generates RPAs, and updates the database. If it is a future effective action, when the effective date is reached, the application selects the employees based on the eligibility criteria and generates the RPAs and updates the database. The application also:

- Realigns vacant and occupied positions to the target organization
- Updates the Assignment information
- Updates the occupied and vacant position information with the information entered for Position Details

10. Print the required reports.

You can print a list form of all employees or individual Notifications of Personnel Action in list or standard form. See: Printing Mass Action Reports, page 4-10

After the Realignment action, you can add the positions and organizations to existing hierarchies or build new hierarchies to represent the reporting relationships.

# Reduction in Force

## Retention Register Folder

The Retention Register lists employees based on Tenure Group, Tenure Subgroup, Service Computation Date (SCD RIF), Performance Score, and Adjusted SCD. The application displays all eligible employees.

The Retention Register folder displays most of the fields that appear on the report. You can customize the folder to include other fields by using the folder tool.

The application sorts the data as follows:

- Tenure Group order (Tenure Group 1 first)
- Veterans Preference (Tenure Subgroup AD first)
- Adjusted SCD (earliest date first)
- last name
- first name
- middle name

You can rearrange the columns, but not the sort order. If you rearrange the columns, the printed Register shows the default column order.

## Extending RIF Lookup Values

If you extend the seeded Lookup values for Tenure, Veterans Preference for RIF, and Rating of Record, do not change the Description fields for the predefined values. The Description field shows the value and its associated sort order.

For example, the GHR\_US\_TENURE Description Field identifies Conditional Tenure Group 2 as II and the GHR\_US\_TENURE\_GROUP Description field shows the sort order for Tenure Group II as 2.

## Producing a Retention Register

Use the Reduction in Force window to view a Retention Register for a specific competitive area and competitive level.

**Important:** This software should not be used as the sole method of assessment for making judgements about hiring, performance, or deployment. Your agency may be held liable if you rely on incorrect computer data or computerized rules to make such judgments. It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate. All personal information that you store or use with this software must be up to date, accurate, and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

### **To Run a Retention Register:**

1. Enter the US Government SCD RIF Person Extra Information for each applicable employee.
2. Enter the Competitive Area and Competitive Level segments on US Government Position Group 1 Extra Information
3. Display the Reduction in Force window.
4. Complete the eligibility criteria.  
Enter a unique name for the criteria and specify the appropriate selection criteria.
5. Enter an Effective Date (generally the OPM RIF date).  
The printed Register displays two dates: the Date of Register (the system date on which you run the Retention Register) and the Effective Date (the OPM RIF date).
6. Choose the Run Register button to save the criteria name and criteria and to preview the selection.  
The application lists all employees who are eligible as of the current date. It does not include pending or future actions that would change an employee's retention standing.

### **See Also**

Retention Register Folder, page 4-17

Printing the Retention Register, page 4-17

### **Printing the Retention Register**

You can print the Retention Register from the window by choosing the Print icon on the toolbar or printing it from the Concurrent Manager. The printed report lists the eligible employees and other required data, such as the number of Vacancies in the Competitive Level.

**Note:** The system bases the printed report on the eligibility criteria only. For example, if you rearrange the column order, the system does not print the report in newly arranged column sequence.

### **To print a Retention Register report from the Concurrent Manager:**

1. In the Submit Processes and Reports window Name field, select the Reduction in Force Retention Register.
2. Enter the criteria in the parameters field.  
The parameters are the same as the ones you completed in the Reduction in Force window.
3. Enter the Print options.
4. Choose the Submit button.

See: Retention Register Folder, page 4-17

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# Talent Management

## Talent Management Overview

Talent Management is essentially the management of worker competencies to meet enterprise objectives. Oracle HRMS, Oracle SSHR, and Oracle Learning Management (OLM) each supply key components of the Talent Management functionality. For many talent-management tasks, you can use either the Oracle HRMS forms-based interface or the SSHR interface.

## Oracle HRMS and Talent Management

The Oracle HRMS Talent Management functionality encompasses competency management, objective setting and management (known in HRMS as *Workforce Performance Management*), appraisals, career paths, education and qualifications, events, and reviews.

### Competency Management

Competencies are measurable skills a workforce either has or must develop to meet enterprise objectives. The Oracle HRMS competency management functions enable you to:

- Define a library of competencies or upload competency definitions from third-parties. You can use such definitions throughout the enterprise to ensure consistency of approach.
- Identify each worker's competencies in a competency profile.
- Measure competencies using either general rating scales or proficiency scales that are specific to the competency.
- Define the competency requirements of a business group, organization, job, or position.
- Define core competencies for a business group or organization. All workers in the business group or organization must have its core competencies.
- Link competencies to qualifications.

### Workforce Performance Management

The Workforce Performance Management functions encompass the setting, tracking, and assessment of objectives throughout a performance-management period, such as a calendar year. The entity that defines this period and its conduct is the *Performance*

*Management Plan* (PMP). For example, when you publish a PMP, the application generates a *personal scorecard* of objectives for each plan member.

The Workforce Performance Management functions enable you to:

- Create a library of reusable objectives.
- Allocate objectives to workers automatically.
- Cascade objectives through the enterprise hierarchy.
- Record and track objective progress.
- Create appraisals automatically for all members of a PMP.
- Assess objectives during appraisals.

## **Appraisals**

The appraisal, during which you can evaluate a worker's current competencies, set or assess objectives, identify training to address deficiencies, and assess a worker's advancement potential, is a key talent-management activity: it provides an up-to-date inventory of worker competencies, and it allows you to specify improvement targets and methods to meet enterprise goals.

Using Oracle HRMS functions, you create the components of the appraisal process, in particular the assessment template, the competency assessment template, and the objective assessment template, and perform related setup tasks. To perform the appraisal itself, you use Oracle SSHR.

## **Career Paths**

You can define career paths based on either job progression or position progression. You define job-based career paths using the Oracle HRMS Map Career Path function. For position-based career paths, you use new or existing position hierarchies.

## **Education and Qualifications**

The Education and Qualifications functions enable you to:

- Identify the educational and professional qualifications your enterprise recognizes.
- Identify the educational establishments that deliver recognized qualifications.
- Record qualifications obtained by each worker.

## **Events and Reviews**

You can set up an event, such as a training course or departmental meeting, and identify employees who are to attend the event. You use this functionality for scheduling training courses only if you are not using Oracle Learning Management.

You can record information about any employee review meeting, such as a performance review, disciplinary hearing, or medical test, using the Employee Review function.

## **Work Preferences**

You can enter work preferences (such as preferred work locations and work hours) for an individual in the Oracle HRMS Work Preferences window.



## **Oracle SSHR and Talent Management**

Managers, HR professionals, and employees can access talent-management functions using SSHR.

### **Appraisals**

Managers and workers use the self-service Appraisals function to define and conduct the appraisal process. Managers use this function to initiate and manage appraisals of their subordinates. Workers use this function to initiate appraisals of themselves. Both workers and managers use this function to participate in appraisals as appraisers, reviewers, or other participants.

### **Workforce Performance Management**

Managers and workers use the self-service Talent Management function to access their Talent Management Task Lists. The list contains tasks, such as Set Objectives and View and Track Objective Progress, that drive the performance-management activity for a single PMP.

### **Questionnaire Administration**

HR Professional users define questionnaires for inclusion in appraisal templates using the self-service Create Questionnaire function. Appraisal questionnaires can include a list of job-based career paths for discussion during the appraisal.

### **Competency Profile**

Managers can use the self-service Competency Profile function to update the competency profiles of their subordinates. Employees can use this function to update their own competency profiles.

### **Suitability Matching**

Managers and HR Professionals can use the self-service Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. The process uses factors such as a person's current role, a person's competency levels (as defined in their competency profile), and succession plans in identifying candidates and opportunities. Employees can use this function to find opportunities suited to their competency levels.

### **Succession Planning**

Managers can use the self-service Succession Planning function to identify potential successors to a position or succession options for a person, based on their position in a position-hierarchy career path.

### **Education and Qualifications**

Managers can use the self-service Education and Qualifications function to update records of educational qualifications obtained by their subordinates. Employees can use this function to update their own records.

## Other Professional Qualifications

Managers can use the self-service Other Professional Qualifications function to update records of professional qualifications obtained by their subordinates. Employees can use this function to update their own records.

## Events and Bookings

Managers can use the self-service Event and Bookings function to create events and event bookings for their subordinates. Employees can use this function to create events and event bookings for themselves.

## Employee Reviews

Both managers and employees can use the self-service Employee Review function to set up review meetings and invite reviewers to attend.

## Work Preferences

Managers can use the self-service Work Preferences function to enter work preferences (such as preferred work locations and work hours) for a subordinate. Employees can use this function to enter their own work preferences.

## Oracle Learning Management (OLM) and Talent Management

Oracle Learning Management (OLM), formerly Oracle Training Administration, is a complete system for the definition and delivery of training. OLM is tightly integrated with the talent-management functionality of HRMS. For example:

- When a learner completes a class, OLM can automatically update the learner's competency profile with the competencies and competency levels delivered by the class.
- An appraisal can include a learning path, which identifies classes to be taken by the appraisee.

Oracle Learning Management requires a separate license.

See: Introduction to Oracle Learning Management, *Oracle Learning Management User Guide*

## Reporting in Talent Management

The Talent Management functions together provide over 50 standard and HRMSi reports. These reports extract and present talent-management-related information about the individual and the enterprise.

See Reports and Processes in Oracle HRMS, page B-1

## Talent Management Key Concepts

For more information about the Talent Management functions, see:

- Appraisals Overview, page 5-71
- Career and Succession Planning, page 5-96
- Career Paths, page 5-98
- Competencies Overview, page 5-8

- Competency Profiles, page 5-26
- Event and Attendance Administration, page 5-105
- Qualification Types, page 5-66
- Suitability Matching, page 5-27
- Workforce Performance Management, page 5-31

## Talent Management Requirements

Oracle HRMS enables you to define all the components of a performance-management system to meet the needs of your enterprise. For example, you can keep a record of each worker's competencies, allocate and track objectives, and perform multiple types of appraisal.

### Can I define objectives once for the enterprise?

Yes. HR Professionals can define reusable objectives in the Objectives Library. Managers and workers can copy objectives from the Objectives Library to workers' *personal scorecards* of objectives.

### Can I allocate objectives automatically to my workforce?

Yes. When you create a Performance Management Plan (PMP), you identify the members of the plan (for example, all members of an organization or all workers in a specified supervisor hierarchy) and indicate whether the plan members should automatically receive objectives from the Objectives Library for which they are eligible.

### Can I track worker progress with objectives?

Yes. Throughout the performance-management period, managers and workers can both view and update a worker's progress. For example, a worker can indicate that an objective is 50 percent complete, and the worker's manager can view this information.

### What are the advantages of the competency functions?

The Oracle HRMS competency functions enable you to:

- Identify and measure consistently the knowledge, skills, and behavior displayed by your workers across the enterprise.
- Speed the deployment process within your enterprise and reduce recruitment costs. You can identify and select workers and applicants on a common basis and match them with opportunities that arise across the whole enterprise. This ensures that an able candidate is not rejected because of a mismatch for one vacancy when other suitable vacancies exist.
- Ensure your enterprise meets its business goals. You do this by linking the competencies held by your workers into the competencies required to meet the business goals of your enterprise.

## Can I perform competency evaluation during appraisals?

Yes. Oracle HRMS's highly configurable web interface enables you to perform competency-based evaluation as part of the appraisal process. You create appraisal templates, which can include competency assessment templates, to define the structure of the appraisal.

## To what extent can the appraisee be involved in the appraisal process?

In HRMS, the appraisal is the product of collaboration between the main appraiser and the appraisee. The main appraiser *shares* the appraisal with the appraisee and specifies which sections of the appraisal the appraisee can view, whether the appraisee can update the appraisal, and whether the appraisee can provide feedback on their final ratings. The appraisee, after making any permitted changes to the appraisal, *shares* the appraisal with the main appraiser to return it. This sharing of the appraisal between the main appraiser and the appraisee can occur as often as necessary during a single appraisal process.

The sharing functions, combined with the appraisee feedback function, encourage discussion throughout the appraisal process. Nonetheless, the appraisals functions are flexible enough also to support the traditional appraisal model, where dialog between the main appraiser and the appraisee is less important. In allowing the main appraiser to select which information to share and when, HRMS gives the main appraiser complete control of the appraisal process.

## Can I create appraisals efficiently?

Yes. Managers and workers can create individual appraisals using the self-service Appraisals function. Alternatively, the application can create appraisals automatically for all members of a PMP.

## Can I define my enterprise's career paths in Oracle HRMS?

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

## Can I link competencies to qualifications?

Yes. You can link a person's acquisition of competencies to their achievement of formal qualifications, typically awarded by external, nationally recognized bodies. Such competencies have well defined performance standards that an assessor uses to determine whether a person has achieved a competency. Thus, you can measure workforce competencies against both enterprise *and* industry or national standards. You can encourage your workforce to acquire such qualifications by developing related competencies, thereby improving the enterprise skill base.

## How can I use Oracle Learning Management (OLM) to help with talent management?

OLM enables you to record the competencies that a course is expected to deliver. You can then use this information to update the competency profiles of the learners who have attended a class.

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

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

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

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

Yes. HRMS Intelligence Reports, Discoverer Workbooks, and Performance Measures enable you to investigate competencies, proficiencies, appraisal activity, and training in your enterprise. You can use HRMS Intelligence to answer business questions such as:

- Who has the required competencies for the job?
- How quickly can I improve the skills of a group of people, and at what cost?
- How do a worker's competencies compare with those required by a particular job?
- Do my employees need more training?

### **I need to enter competency information from a third-party skills vendor. How can I do this efficiently?**

You can quickly and efficiently load competency details from a third-party skills vendor directly into Oracle HRMS using Web Applications Desktop Integrator (Web ADI). Web ADI enables you to manipulate and upload competency information, such as rating scales, rating levels, and competencies, from a text file or spreadsheet into the application. This means you can automatically load data into the application without having to enter the details individually.

See: Uploading Third-Party Competency Information, page 5-19

# Competencies

## Competencies Overview

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

- Piece of knowledge (such as knowledge of data protection laws)
- Skill (such as an interpersonal skill, soldering a joint)
- Attitude (such as a proactive approach to work)
- Attribute (such as absence of color blindness or perfect pitch)

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

You can create competencies that are available to a particular business group only, or, if your system administrator has set the HR: Cross Business Group profile option to Yes, you can create global competencies that are available to all organizations within your enterprise.

## Competency Measurement

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

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

Competencies are quantified and measured using:

- Proficiency levels, page 5-9 and behavioral indicators
- Rating scales, page 5-10

## Unit Standard Competencies

Competencies that lead to formal qualifications are known as *unit standard competencies*. (A Unit Standard is typically a nationally registered document that describes performance standards for a competency. Industry representatives define and maintain the Unit Standard.)

A qualification results from the achievement of one or more unit standard competencies. Such qualifications are registered with a national Qualifications Framework, which identifies, for example, the number of credits attached to the

qualification and to its constituent competencies, the awarding body, and the field of learning to which the qualification belongs.

To measure a unit standard competency, you define one or more *outcomes* (behaviors or performance criteria), each of which has its own *assessment criteria*.

## Competency Profiles

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

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

## Competency Delivery with Oracle Learning Management (OLM)

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

**Note:** You must purchase Oracle Learning Management separately to use this functionality.

## Competency Validation and Driving Alerts

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

## Proficiency Levels

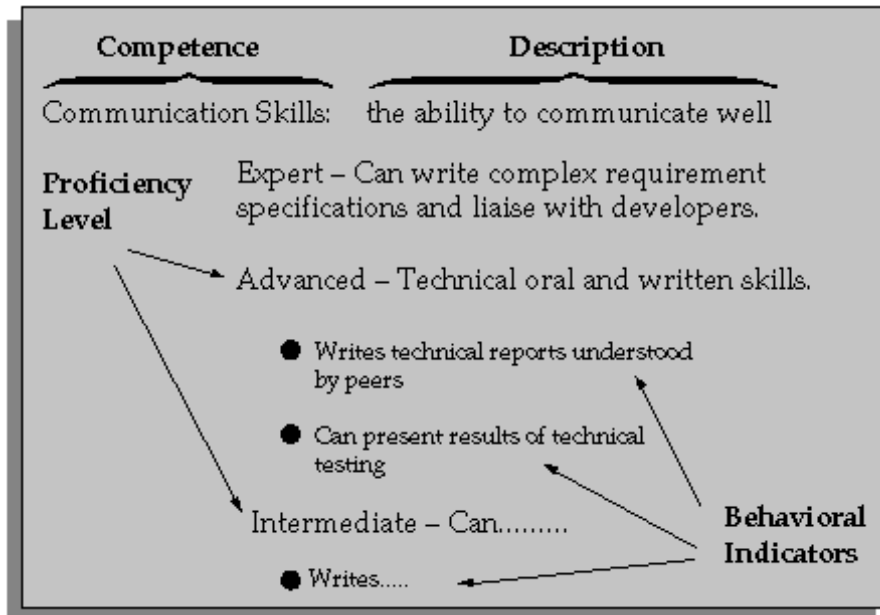
To enable you to fully express how a competency is exhibited, Oracle Human Resources enables you to identify the proficiency at which a competency is performed.

## Behavioral Indicators

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

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

### Competencies, Levels, and Indicators



## Retrieval of Proficiency Levels

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

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

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

## Unit Standard Competencies

You can define proficiency levels for unit standard competencies. You may want to do this, for example, so that you can measure all enterprise competencies using the same method. However, you must also define outcomes and assessment criteria for unit standard competencies if they are to lead to formal qualifications.

## Rating Scales

Rating scales describe competencies and objectives in a general way.

Rating scales are of three types:

- **Proficiency scales** measure a person's mastery of a skill or technique. For example, a person's management skills could be:
  1. Basic
  2. Good
  3. Excellent



#### 4. Expert

You apply proficiency rating scales to competencies only. You can apply a single proficiency scale to multiple competencies. (Alternatively, you can define proficiency levels that are unique to a competency. See: Competency Measurement, page 5-11)

You can measure unit standard competencies using proficiency rating scales. You may want to measure all enterprise competencies using the same scale, for example. However, you must also define outcomes and assessment criteria for unit standard competencies if they are to lead to formal qualifications.

- **Performance scales** measure a worker's *delivery* of a competency or objective. A worker's competency can rank high on a proficiency scale but less high on a performance scale, or low on a proficiency scale but much higher on a performance scale. You can select a performance rating scale when defining competency assessment templates, objective assessment templates, and appraisal templates.
- **Weighting scales** measure the importance of a competency to the enterprise. For example, a competency's importance could be one of:
  1. Low
  2. Medium
  3. High

A skill that is extremely important to the enterprise would attract a higher weighting than one that is occasionally relevant or of minor importance. You can select a weighting scale when defining a competency assessment template.

**Note:** You can also apply weighting values to objectives. However, you do not use weighting scales. Instead, the lookup HR\_WPM\_WEIGHTING defines a single scale for use throughout the enterprise.

You can create rating scales that are available to a particular business group only, or, if your system administrator has set the HR: Cross Business Group profile option to Yes, you can create global rating scales that are available to all organizations within your enterprise. If you use more than one rating scale of a particular type (for example, if you use multiple proficiency rating scales), ensure they are comparable by giving high numbers to high ratings and low numbers to low ratings.

### Default Rating Scales

When you define a proficiency, performance, or weighting scale you can make it the default scale of that type either within the current business group or globally.

### Rating Scale Attachments

You can add attachments to rating scales. For example, you can attach a competency or objective description or a video of a person demonstrating a skill.

## Competency Measurement

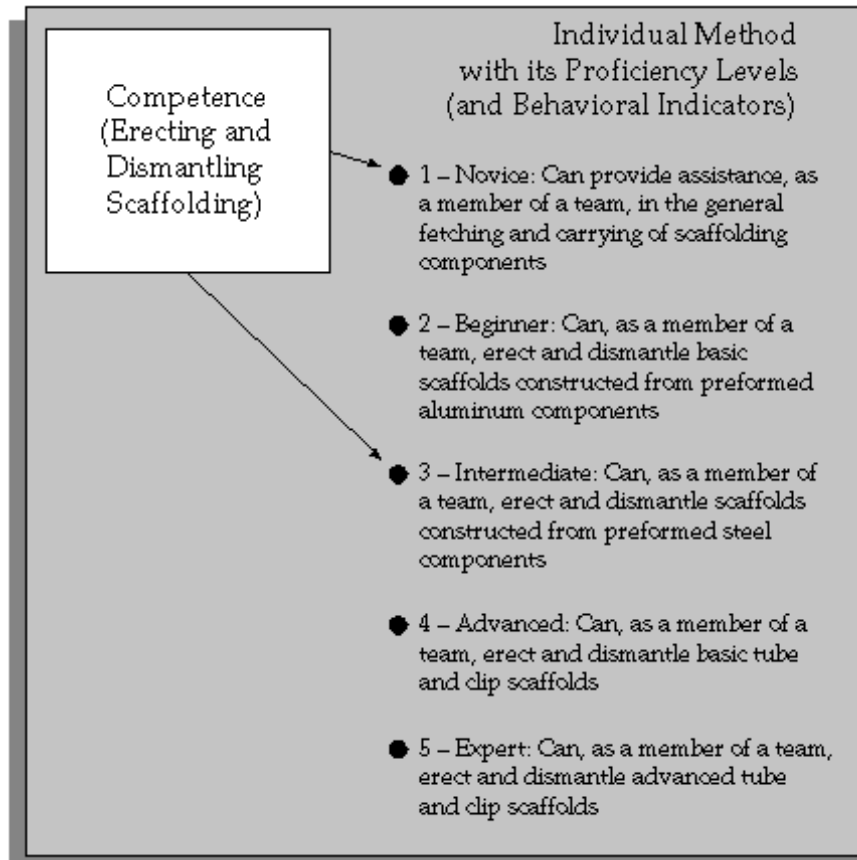
To measure competencies you can define:

- **Proficiency levels**, which are specific to the competency
- **Proficiency rating scales**, which you can apply to multiple competencies

## Proficiency Levels

This figure shows the competency Erecting and Dismantling Scaffolding, its proficiency levels, and its behavioral indicators. The behavioral indicator for each proficiency level is detailed and specific: you could not apply these behavioral indicators to a different competency.

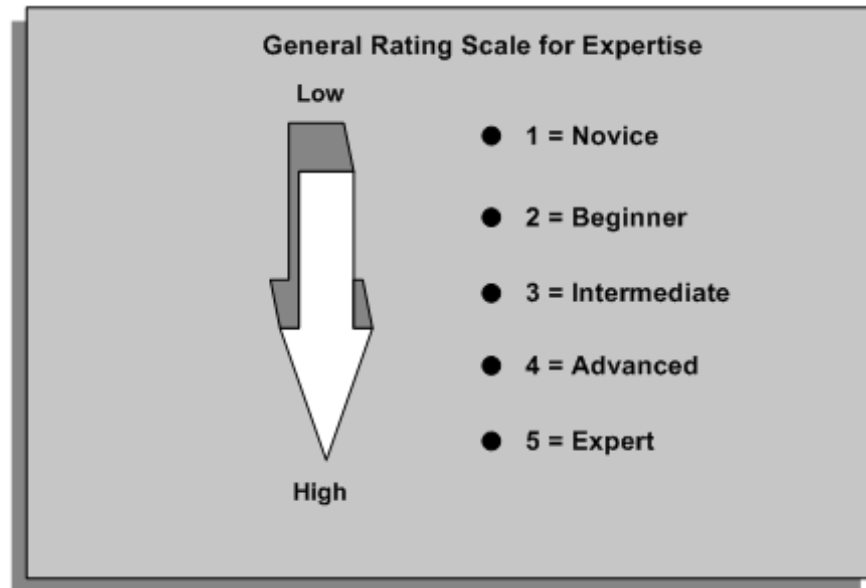
### Proficiency Levels



## Proficiency Rating Scales

This figure shows a general rating scale (Expertise) with generic proficiency levels. You could apply this scale to any competency.

### Proficiency Rating Scales



See: Rating Scales, page 5-10

### Which Method of Measurement?

Proficiency levels are suitable if your enterprise competencies are varied and you want to define accurately what is expected of your workforce. The result is multiple, equivalent measurement systems. Proficiency rating scales are suitable if generic proficiency levels provide enough detail for your purposes and if consistency of measurement is important.

You can use both methods. For example, you could use a proficiency rating scale for your core competencies and proficiency levels for specific job or position competencies. Whichever approach you adopt, give high numbers to high ratings and low numbers to low ratings, so that analysis of the ratings gives consistent and sensible results.

### Measuring Unit Standard Competencies

For unit standard competencies, which can lead to formal qualifications, you must define outcomes and specify assessment criteria. Outcomes are nationally defined behaviors or performance standards specific to the unit standard competency. Each outcome has a set of assessment criteria. A registered assessor (from the awarding body, for example) determines whether a worker has achieved the unit standard competency by measuring the outcomes using the assessment criteria.

You can also measure unit standard competencies using proficiency levels or proficiency rating scales. For example, you may want to measure all enterprise competencies using a general rating scale, regardless of whether they lead to formal qualifications. However, the proficiency rating scale or proficiency levels must be in addition to the outcomes and assessment criteria you define for unit standard competencies.

## Assessing Competencies

During an appraisal, you assess a worker's competency levels using the measurement scheme defined for each competency.

See: Assessing Competencies and Objectives, page 5-91

## Competency Types

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

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

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

## Advantages of Grouping Competencies

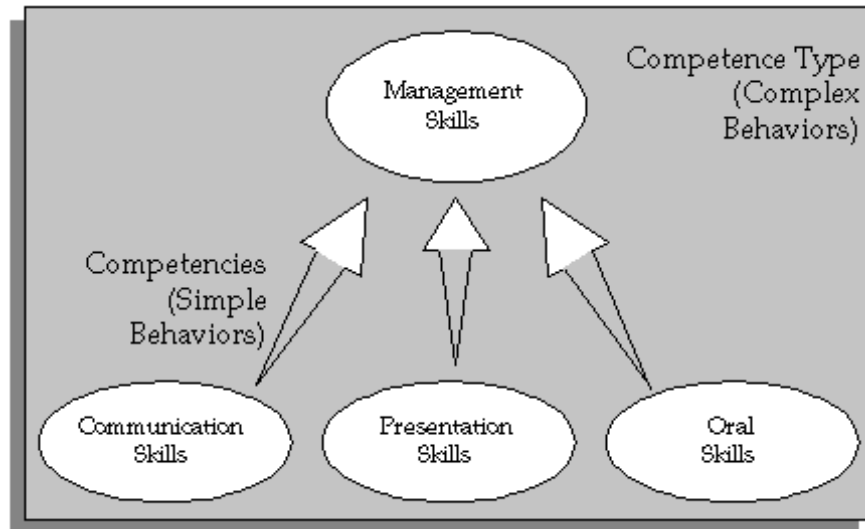
Grouping competencies is useful, for:

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

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

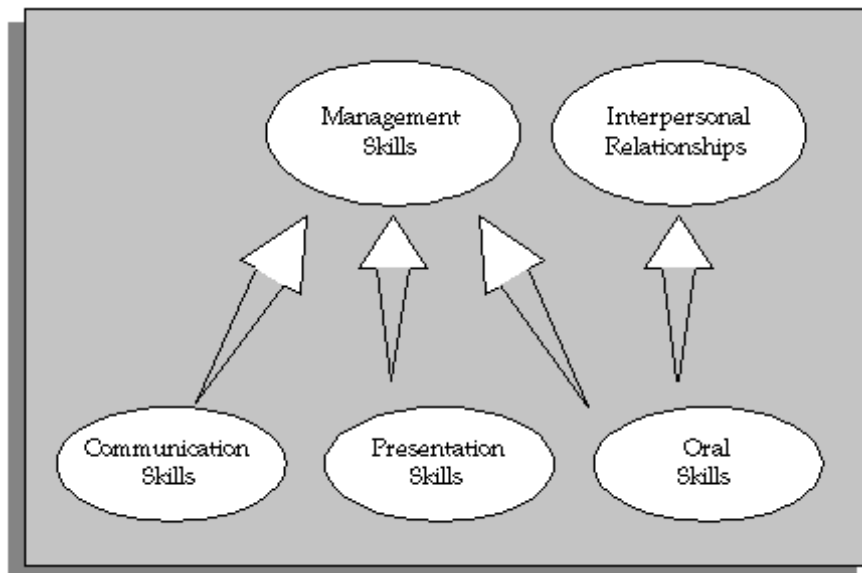
The following figure illustrates related competencies grouped by type Management Skills.

### Grouping Competencies into Types



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

#### Competencies Belonging to More Than One Type



## Creating a Rating Scale

Use the Rating Scales window to create general rating scales.

#### To create a rating scale:

1. Enter a name and description for the rating scale, for example, Expertise.
2. Select the type of rating scale to create, for example, performance, proficiency or weighting.

3. Check the Default Rating Scale check box if you want to make this rating scale the default, otherwise leave this box blank.
4. If you want this rating scale to be a global rating scale, that is, if you want the rating scale to be available to all Business Groups in your enterprise, then check the Global check box. Once you have saved the rating scale you will not be able to amend this check box.

**Note:** You will only be able to create global rating scales if your system administrator has set the HR: Cross Business Groups profile to Yes.

5. Enter the first level and description for the rating scale. For example, enter **1** in the Level field and **Novice** in the Name field.
6. Enter the behavioral indicator for that level. For example, Meets expectations.  
You can enter up to 2000 characters for each behavioral indicator.
7. You can add attachments to the rating scales, if required. For example, you can attach a competency description or a video of the skill.
8. Continue to enter levels and description for the rating scale then save your changes.

## Creating a Competency

Use the Competencies window to create competencies.

### To create a competency:

1. Choose New in the Find Competencies window.
2. Select either Local or Global in the Scope region.
  - A local competency is visible only within the current business group, and the competency key flexfield for the business group defines the competency name structure.
  - A global competency is visible to all business groups in your enterprise. You can select Global only if your system administrator has set the HR: Cross Business Group and HR: Global Competency Flex Structure user profile options to Yes. The global competency key flexfield defines the competency name structure.

If you change your scope selection, Oracle HRMS deletes any information you entered in the Name, Rating Scale, and Primary Evaluation Method fields.

**Note:** Once you have saved a competency, you cannot change its scope.

3. Click in the Name field and complete the fields in the Competency Flexfield window.
4. Enter a description for the competency.
5. If you use Oracle Projects, enter a name or code in the Alias field to identify the competency. Otherwise, leave the field blank.
6. If you are defining a unit standard competency, select Unit Standard in the Cluster field.

**Note:** Once you have saved a competency, you cannot change its cluster value from Unit Standard to any other value.

### Entering Qualifications Framework Details

**Note:** This section applies only if you are defining a unit standard competency.

7. Choose the Unit Standard Qualifications Framework Details tab.
8. In the Unit Standard ID field, enter the Qualifications Framework code for the competency.
9. Select the main and subsidiary fields of learning to which the competency belongs.  
  
The main field of learning identifies the industry or sector to which the competency belongs (for example, Management Studies or Nursing).  
  
The subsidiary field identifies the subject area within the field of learning to which the competency belongs (for example, Marketing or Neonatal Care).
10. Select the level type and level.  
  
Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a competency could be at Level 6 on a scale ranging from Level 1 through Level 8.  
  
The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).
11. Select the credit type and enter the number of credits this competency earns.  
  
The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a unit standard competency.
12. Select the codes that identify the provider of the unit standard competency and the provider's Quality Assurance (QA) organization.

### Entering Rating or Proficiency Information

This section applies primarily to competencies that are not unit standard competencies. Although you can select a rating scale or specify proficiency levels for a unit standard competency, you must also complete the tasks described in Entering Outcomes and Assessment Criteria, page 5-18.

13. Choose the Valid Date and Proficiency tab to specify how and when you will measure the competency.
14. Enter the dates between which the competency is valid. You must enter a start date but you can leave the end date blank.
15. You can either select a general rating scale or define proficiency levels specific to this competency.  
  
To select a rating scale:
  1. Select the Scale option.
  2. If you have defined a default proficiency rating scale for this type of competency (local or global), its name appears automatically in the Rating Scale field. Otherwise, select a rating scale.

3. To view the selected rating scale, choose the Levels button.

To specify proficiency levels:

1. Select the Levels option.
2. Choose the Levels button to display the Levels window.
3. Define the first proficiency level by assigning a level number (for example, 0), a name (for example, No Skill), and a behavioral indicator (for example, "A beginner who has no experience of scaffolding and cannot assemble scaffolding without constant assistance"). Repeat this step for other proficiency levels.

### **Entering Competency Evaluation Details**

16. Select the main method of evaluating the competency (for example, Written Examination or Peer Assessment). The values in the list depend on whether the competency is local or global.
17. To specify when the competency must be reassessed, enter a number in the Renewal Period field and select a unit. For example, enter 5 in the Renewal Period field and select Year if you assess the competency every 5 years.
18. Select Certification Required if you need a certificate to confirm possession of the competency. For example, you may need a driving license to prove competency to drive.

If you select Certification Required, when you indicate that a person has this competency (in their competency profile), you must enter the certification method and date.

19. Save your work.

### **Entering Qualifications Information**

**Note:** This section applies only if you are defining a unit standard competency.

20. Choose the Qualifications button to display the Competency Qualifications window.
21. In the Qualification Links region, select the name of a qualification to which achievement of this unit standard competency contributes.  
The identifier of the selected qualification appears automatically.
22. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
23. Repeat Steps 21 and 22 for additional qualifications. (A single unit standard competency can contribute to more than one qualification.)
24. Save your work.

### **Entering Outcomes and Assessment Criteria**

**Note:** This section applies only if you are defining a unit standard competency.

25. Choose the Outcomes button to display the Outcomes and Assessment Criteria window.
26. Enter the number and name of a behavior or performance standard (for example, "Audience response above average" for a presentation skills competency).



27. Enter the dates between which the outcome is valid. You must enter a start date but you can leave the end date blank.
28. In the Assessment Criteria field, define how to assess the outcome (for example, "Audience rating for a minimum of three presentations is 60% or higher"). This information must help an assessor decide whether an outcome has been achieved.
29. Repeat Steps 26 through 28 for additional outcomes.
30. Save your work.

## Querying a Competency

When you open the Competencies window, the Find Competencies window appears automatically.

You can query a competency by specifying any combination of:

- Full or partial competency name
- Competency type
- Qualifications Framework qualification, which limits the search to those unit standard competencies linked to the qualification
- Organization, job, or position that has competency requirements (specified in the Competency Requirements window)

### To query a competency:

1. Select Local or Global. Local limits the search to competencies in the current business group. Global limits the search to competencies defined as global.
2. Enter your search criteria.
3. Choose the Find button.

The first competency that matches your search criteria appears in the Competencies window. Press the Down Arrow key to scroll through additional matching competencies.

The competency name displayed in the Competencies window comprises the values you entered in the Competency Flexfield window when you created the competency. For example, if the Competency Flexfield window has one required field and two optional fields, and you enter the competency name Teamwork in the required field and leave the optional fields blank, the competency appears in the Competencies window as "Teamwork ..", where two dots represent the empty optional fields.

## Uploading Third-Party Competency Information

Use the Upload Third Party Skills facility to transfer competency information from a third-party skills vendor into Oracle HRMS. This facility enables you to manipulate competency details such as rating scales, rating levels, and competencies from a text file or spreadsheet and upload directly into the application using Web Applications Desktop Integrator (Web ADI).

See: Data Upload Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

1. If you intend to transfer data from a text file into Oracle HRMS, then ensure the text is formatted correctly.

See: Format of Text Files, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

If you do not use a text file, then you can enter the data directly into the spreadsheet document Web ADI creates.

2. Use Web ADI to manipulate and upload your competency information. Select Career Management, then Upload Third Party Skills from the menu.

See: Uploading Data from Legacy Systems Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Uploading Data Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Ensure you select the appropriate integrator and layout for the competency information type you want to upload. For example, select the HR Upload Third Party Rating Scales integrator if you want to upload rating scales information.

See: Using Integrators from the Web ADI Self-Service Menu, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

If the upload is successful, the data is uploaded to the database. Confirmation messages indicate the success of the upload.

If the upload fails, return to the spreadsheet and correct any errors, then retry the upload. Further messages are available in the Messages column at the end of each row of the spreadsheet.

## Grouping Competencies into Types

Use the Competency Types window to perform this task.

In order to perform this task, competency types must have been defined using the Lookup type COMPETENCE\_TYPE.

### To group competencies into types:

1. Query the competency type under which you want to group competencies.
2. Select the first competency to group within the competency type.
3. Continue to enter competencies to group within the competency type, then save your work.

# Competency Requirements

## Competency Requirements

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

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

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

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

## Core Competencies

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

## Business Group and Organization Competencies

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

## Job and Position Competencies

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

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

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

## Competency Copying

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

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

## Essential Competencies and Suitability Matching

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

## Grades and Competencies

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

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

## Defining Competency Requirements - Core or Generic Competencies

Use the Competency Requirements window to define your competency requirements with core or generic competencies.

### **To define competency requirements (with core or generic competencies):**

1. Select the Business Group for which you want to create competency requirements.
2. Choose the Find button. Oracle Human Resources retrieves competencies if you have previously defined them as required for the Business Group, otherwise it retrieves nothing.
3. Choose Clear Record after you have looked at the existing competencies.
4. You can now do the following:
  - Create Competency Requirements for the Business Group, page 5-22
  - Copy Existing Core Competencies to an Organization, Job or Position, page 5-23

### **Create Competency Requirements for the Business Group:**

1. Select the first competency.
2. Select the highest and lowest proficiency levels at which the competency is acceptable, if required.

If you are going to copy these requirements to an organization, job or position, you can choose not to copy these proficiency levels over.

3. Check the Essential check box if the competency is essential for this Business Group, otherwise, leave the box unchecked.

**Note:** Only enter a grade if you are creating competency requirements for a job or position.

4. Enter the dates between which the competency is valid for this Business Group. You must enter a From date but you can leave the To date blank.
5. Continue to enter competencies for the Business Group, then save your changes.

**Copy Existing Core Competencies to an Organization, Job or Position:**

1. Clear the details from the Business Group before you copy the competencies.
2. Select the organization, job or position to which you want to copy the core competencies and choose the Find button.
3. Choose the Copy Competencies button. A Copy Competencies window appears.
4. Leave the Core Competencies box checked.
5. If you want to copy the proficiency levels, leave the Copy Levels box checked, and enter the dates between which the competency is valid (you must enter a From date but you can leave the To date blank). If you do not want to copy the proficiency levels, uncheck the box.
6. Choose the Copy button, and Oracle Human Resources copies the competencies to the organization, job or position.
7. If required, make changes to the competencies you have copied. These can include the following:
  - Deleting any of the core competencies that are not required by the organization, job or position
  - Changing the proficiency levels
  - Checking or unchecking the Required check box
  - Entering a grade (for a job or position only)
  - Changing the dates between which the competency is valid
8. Save your changes.

## Defining Competency Requirements - No Core Competencies

Use the Competency Requirements window to define your competency requirements with no core or generic competencies.

**To define competency requirements (no core competencies):**

1. Select the organization or job for which you want to create competency requirements. If you are creating competency requirements for a position, you must also select the organization and job to which the position belongs.
2. Choose the Find button.

Oracle Human Resources retrieves competencies if you have previously identified them as required, otherwise it retrieves nothing.
3. Select the first competency.

4. Select the highest and lowest proficiency levels at which the competency is acceptable, if required.  
If you are going to copy these requirements to other organizations, jobs or positions, you can choose not to copy these proficiency levels over.
5. Check the Essential check box if the competency is essential, otherwise, leave the box unchecked.
6. Select the grade (for a job or position only), if required.
7. Enter the dates between which the competency is valid. You must enter a From date but you can leave the To date blank.
8. Continue to add further competencies for the organization, job or position, if required.

## Copying Competencies

You use the Competency Requirements window to copy competencies from an organization, job or position.

### **To copy the competencies from an organization, job or position :**

1. Select the organization, job, or position to which you want to copy the competencies.
2. Choose the Find button.  
Oracle Human Resources retrieves any competency requirements previously created.
3. Choose the Copy Competencies button. A Copy Competencies window appears.
4. Uncheck the Core Competencies box. The organization, job and position fields are now active.
5. Select the organization, job or position from which you want to copy the competencies.
6. If you want to copy the proficiency levels, leave the Copy Levels box checked, and enter the dates between which the competencies are valid. You must enter a From date but you can leave the To date blank. If you do not want to copy the proficiency levels, uncheck the box.
7. Choose the Copy button, and Oracle Human Resources copies the competencies.
8. You can make changes to the competencies copied over, such as:
  - Deleting any of the core competencies that are not required by the organization, job or position
  - Changing the proficiency levels
  - Checking or unchecking the Required check box
  - Entering a grade (for a job or position only)
  - Changing the dates between which the competency is valid
9. Save your changes.

## Viewing Competency Requirements at Organization, Job or Position Level

Use the Competency Requirements window to view competencies required at organization, job or position level.

### **To view competencies required at organization, job or position level:**

1. Select the Business Group, organization, job or position for which you want to view competencies.
2. Choose the Find button.

# Competency Profiles

## Competency Profiles

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

- A competency profile, which is a list of a person's competencies showing their level of proficiency in each competency. For unit standard competencies, the competency profile records the status of each competency.
- Qualifications, including details of individual subjects, grades, licenses, status of ongoing training, and tuition fees.
- Attendances at educational establishments, such as schools and colleges.
- Work choices, including willingness to travel and relocate, preferred working hours, work schedule, and duration within post, and preferred countries for international relocation.

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

## Copying Core or Primary Assignment Competencies

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

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

## Managing Competencies Over Time

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

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



## Suitability Matching

Once your worker competencies and proficiency levels are held in competency profiles (and job requirements in their own profile), you can use the Suitability Matching module to compare a person's competency profile with the requirements of a work opportunity.

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***

<b>Category</b>	<b>Option</b>	<b>Access by Responsibility</b>
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

### **Refining a Suitability Search**

You can refine a suitability search by specifying that you want to search for people with a proficiency level in a specific competency, at a required level and above (or below).

To restrict your search further, you can determine the match type by identifying required and optional competencies and work choices.

## Creating a Competency Profile

Use the Competency Profile window to create a person's competency profile. To maintain a competency profile, you use either the Competency Profile window or the SSHR function Competency Profile, which is available to both employees and managers.

The Competency Profile window displays all competencies, past and present, held by the person. If you want to see only current competencies and proficiency levels, select Current Competencies.

**Note:** If the person for whom you are entering competencies has person records that are linked together in more than one business group, then you will be able to see, but not update, any global competencies entered for them in other business groups.

### To create a competency profile:

**Tip:** This section describes how to enter individual competencies. You can also copy the enterprise's core competencies, or those defined for a vacancy or a person's primary assignment, to the competency profile. See: To copy competencies from requirements to the competency profile, page 5-29

1. Select the first competency this person possesses.
2. Select the proficiency level at which the person performs the competency.
3. Enter the date from which the person possesses the competency at this level. For example, if the person gained the competency through a qualification, enter the date the qualification was gained. You can enter a date when the competency expires, if required.

**Note:** If you update a proficiency level, enter the date from which the new level applies. When you save the competency profile, Oracle HRMS automatically ends the previous proficiency level on the day before the new level starts.

The Status field, which is read only, can contain the value Achieved or In Progress.

- When the person has achieved all outcomes for a unit standard competency, its status is Achieved. Otherwise, its status is In Progress.

When you save the competency profile, Oracle HRMS changes the status of a unit standard competency from In Progress to Achieved if the person has achieved all outcomes for the competency.

- All non-unit-standard competencies have the status Achieved, by default.

When you add a competency to the profile, the Status field is blank. Oracle HRMS populates the field only when you save the competency profile.

4. In the Source of Proficiency Rating field, you can select the method by which the person gained the competency, such as training course or previous experience.

### Entering Certification Details

5. Choose the Certification tab.

6. Select the certification method (for example, examination) for the competency and enter the certification date.
7. In the Next Review field, enter the date on which you must reassess the competency, if appropriate.

#### **Viewing Qualifications Framework Details**

8. **Note:** This step applies to unit standard competencies only.

Choose the Unit Standard Qualifications Framework Details tab.

The Qualifications Framework Details for the unit standard competency appear, including the number of credits associated with the competency, the field of learning to which the competency belongs, and the unit standard identifier.

9. Repeat from Step 1 to select additional competencies.
10. Save your work.

#### **To record outcomes achieved:**

**Note:** This procedure applies to unit standard competencies only.

You record outcomes achieved towards a unit standard competency in the Outcomes Achieved window.

1. Select a unit standard competency and choose the Outcomes Achieved button.
2. Select the name of the outcome achieved towards the selected unit standard competency.  
  
The assessment criteria for this outcome appear in the Assessment Criteria field.
3. In the Date From field, select the date on which the outcome was assessed as achieved.
4. If the outcome must be reassessed at a future date, enter that date in the Date To field.
5. Repeat from Step 2 for additional outcomes for this unit standard competency.
6. Save your work.

If the person has achieved all outcomes for a unit standard competency, Oracle HRMS updates the status of the competency to Achieved when you save the competency profile. Otherwise, the competency status remains In Progress.

#### **To copy competencies from requirements to the competency profile:**

1. Choose the Copy Competencies button to display the Copy Competencies window.
2. Do one of the following:
  - Select Core Competencies to copy the competencies you defined as essential to your enterprise.
  - Select Primary Assignment Competencies to copy the competencies required in the organization, job, or position to which the person is assigned.
  - Select a vacancy to copy the competencies required in the organization, job, or position for which you defined the vacancy.

3. Enter the dates between which the competencies are valid. You must specify a start date, but you can leave the end date blank.
4. Choose the Copy button.

You can now update the copied competencies (for example, by specifying proficiency levels and certification details).

## Entering Work Choices for a Person (Work Choices Window)

In Oracle HRMS you can enter a person's work choices, such as their willingness to travel or relocate, their preferred working hours and work schedule, and the length of time they would like to stay in their next post. You can then compare these choices with the work requirements of jobs or positions when you are planning redeployment.

You enter personal deployment choices in the Work Choices window, accessed from the People window.

### To enter work choices for a person:

1. Check the relevant work capabilities boxes if the person is:
  - Willing to work in all locations
  - Willing to relocate
  - Willing to travel
  - Prepared to work in their current location only
  - Willing to visit internationally
2. Select the length of time the person wants to stay in a role, for example, indefinite or two years.
3. Select the person's preferred working hours (for example, 9.00 to 5.30), work schedule (the working days in the week or pattern of shifts), the proportion of full time hours available and any relocation preferences (for example, with family).
4. Check the relevant international deployment boxes if the person is willing to:
  - Work in all countries
  - Relocate
5. Select the countries in which the person prefers to work, and any countries in which they are not prepared to work.
6. Save your work.

# Workforce Performance Management Overview

## Workforce Performance Management Overview

Successful enterprises set objectives for their workers that are consistent with the enterprise strategy and that contribute to business goals. To support enterprise-directed objective setting, management, and assessment, HRMS provides an integrated set of *Workforce Performance Management* functions. Enterprises can:

- Define objectives consistently and allocate them efficiently throughout the enterprise.
- Align worker objectives with the strategy and goals of the business.
- Track worker achievement of objectives.
- Assess worker performance in the delivery of objectives.

Workers can participate in the objective-setting process and understand how their performance contributes to business outcomes.

## The Performance-Management Process

Using Oracle HRMS, you manage workforce performance for a specified period of time, such as a calendar or financial year, and for a specified workforce, such as all workers in a supervisor hierarchy or in an organization. To define performance-management activities, the HR Professional creates a *Performance Management Plan* (PMP), a configurable control document that can define:

- Objective-setting and objective-tracking processes
- Appraisal-management processes

You select both options in your PMP to take full advantage of the performance-management functions. Alternatively, you can define a PMP to manage objectives only or appraisals only. You can define as many PMPs as the enterprise requires, and a worker can belong to multiple PMPs. For more information, see *Performance Management Plans*, page 5-36

To start the performance-management process, the HR Professional *publishes* the PMP. At this point, the application:

- Creates a *personal scorecard* of objectives for each member of the plan.
- Generates a list of tasks for workers and managers that drive performance-management activities. Each task that the application generates belongs to one of three processes:
  - Objective Setting
  - Objective Tracking
  - Appraisal

## The Objective-Setting Process

During this process, which lasts for the period specified in the PMP, worker and manager update the worker's personal scorecard by adding, updating, or removing objectives. The personal scorecard transfers between worker and manager until the objective-setting process is complete. The manager then approves the worker's personal scorecard to change its status to "Published."

## The Objective-Tracking Process

During this process, worker and manager can:

- View the worker's personal scorecard.
- Record progress made against each objective.

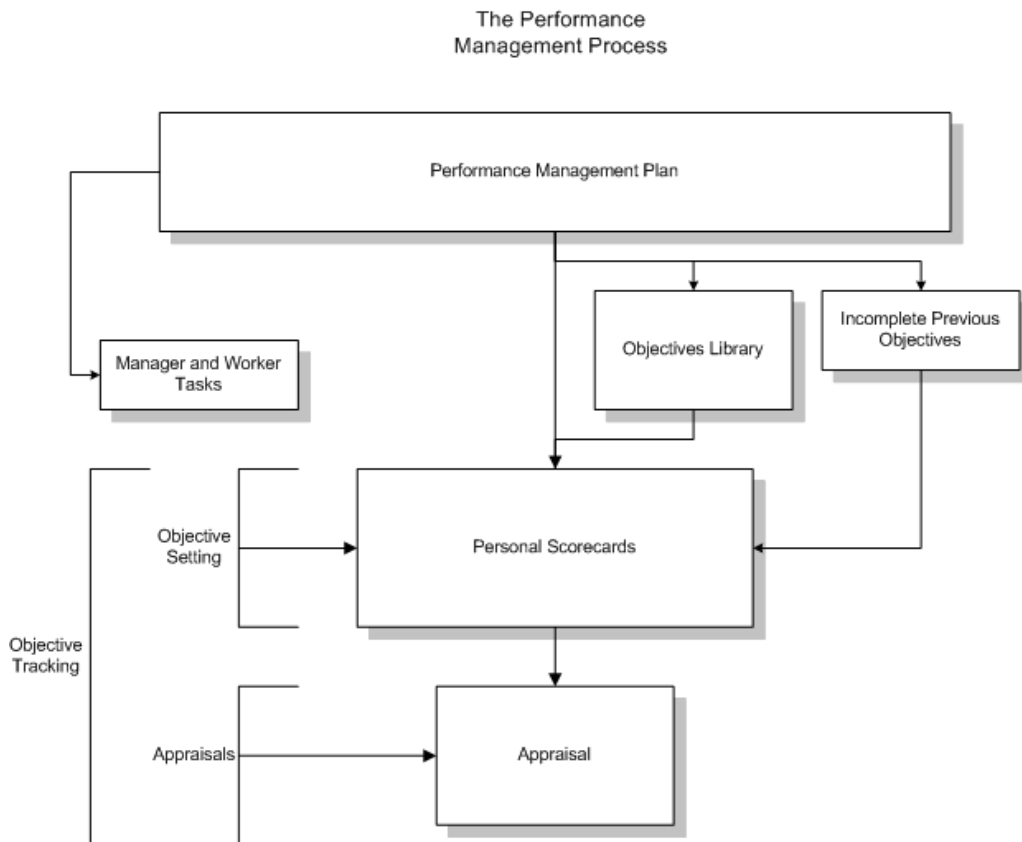
This process lasts throughout the performance-management period.

## The Appraisal Process

During this process, which can occur multiple times during the performance-management period:

- The application creates appraisals automatically for all PMP members on a date that you specify. The application copies the worker's personal scorecard of objectives to the Objectives section of the appraisal.
- Manager and worker conduct the worker's appraisal.

The following figure summarizes the HRMS performance-management process:



When you publish a PMP, the application generates tasks for workers and managers and a personal scorecard of objectives for each plan member. The application can copy to each personal scorecard:

- Objectives from the Objectives Library for which the worker is eligible

- Incomplete objectives from previous scorecards or appraisals, provided that the application created those scorecards or appraisals automatically from the previous PMP

Workers and managers complete worker scorecards during the objective-setting process and appraise performance during the appraisal process. Workers and managers can view personal scorecards and track progress throughout the performance-management period.

## Key Functions of HRMS Workforce Performance Management

HRMS provides a rich set of functions to support workforce-performance management and appraisal.

### The Objectives Library

HR Professionals can create a *library* of standard, reusable objective definitions for the enterprise to promote efficiency and consistency. Workers and managers can search this library for objectives to copy to personal scorecards, and the application can automatically allocate objectives from the library to eligible workers.

To populate the library, HR Professionals can either create individual objective definitions or import them from other sources using Oracle Web ADI.

See: The Objectives Library, page 5-43

### Automatic Allocation of Objectives

HRMS can automatically allocate objectives from the Objectives Library to workers based on eligibility rules that you define in eligibility profiles. This function enables you to allocate some or all objectives efficiently throughout the enterprise.

See: Allocating Objectives to Workers Automatically, page 5-53

### Objective Definition

The HRMS objective-definition functions support the creation of specific, measurable, achievable, realistic, and time-based (SMART) objectives. For example, you can specify how you will measure achievement of objectives, include target dates, and mark objectives for inclusion in appraisals. You can also include links to attachments and provide supporting descriptions. Managers can define objectives for workers, and workers can define objectives for themselves, subject to management approval.

See: Creating Objectives, page 5-44

### Cascade Objectives Through the Enterprise Hierarchy

Managers can *cascade* their own objectives to workers reporting directly to them, either by duplicating their own objectives or by creating new, related objectives. Those workers can repeat the process for workers reporting to them, and so on throughout the enterprise hierarchy. Cascaded objectives constitute an objectives hierarchy, with each objective supporting an objective above it in the hierarchy.

See: Cascading Objectives, page 5-48

## Define Relationships Between Objectives

Workers can *align* their objectives with objectives that other workers have *shared* with them as a way of establishing a network of relationships between objectives. This approach may be useful in enterprises that use matrix-management techniques rather than standard reporting hierarchies.

See: Sharing and Aligning Objectives, page 5-55

## Automatic Creation of Appraisals

You can generate appraisals automatically from the PMP. HRMS creates appraisals on a specified date for all members of the PMP using the appraisal template that you select. The application also assigns the appraisal to the "initiator" that you identify and automatically includes each worker's personal scorecard of objectives in the Objectives section of the appraisal. This approach is highly efficient, as individuals do not have to create appraisals or populate the Objectives section. It also enables you to enforce both the timing and the format of the appraisal. This function is completely integrated with and enhances the HRMS appraisal process.

See: The Appraisal Process, page 5-74

## Setting Up Workforce Performance Management

Before you can use the HRMS Workforce Performance Management functions, some setup steps are required.

To set up Workforce Performance Management:

1. Add the Objectives Library function to appropriate HR Professional menus. This function appears on HRMS Manager Career Management menus by default. As access to the function enables users to perform all objectives-library tasks, do not allow general access to this function.

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

2. Add the Performance Management Plans function to appropriate menus. This function appears on HRMS Manager Career Management menus by default. Access to this function enables users to create new plans and query plans to which they have access. Users can access plans that they administer and plans administered by people to whom they have access.

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

3. The Manage Appraisal Templates, Manage Objective Assessment Templates, and Manage Competency Assessment Templates functions appear by default on the HR Professional Responsibility menu. Add these functions to other menus, if appropriate.

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

4. HR Professionals can import objectives to the Objectives Library using Oracle Web ADI. Ensure that relevant users have access to Web ADI and that you have configured Web ADI correctly.



See: Implementing Web ADI for Use with Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

5. Populate the following lookups:

- HR\_WPM\_MEASURE\_UOM

For objectives with a quantitative measurement style, this lookup identifies units of measure, such as percentage, weight, number, and currency values.

- HR\_WPM\_PRIORITY

Using this lookup, users can allocate a relative priority to objectives (for example, low, medium, or high).

- HR\_WPM\_GROUP

Using this lookup, users can group objectives into types (such as Communication, Management, and Personal Development).

- HR\_WPM\_WEIGHTING

This lookup defines a scale of weighting values (integers) for use throughout the enterprise. For example, the values could be 1, 2, 3, 4, and 5, where the value 5 indicates an objective of greater importance than the value 1.

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

6. HRMS can allocate objectives to workers automatically based on eligibility profiles. To use this function, you must create eligibility profiles before creating the PMP.

See: Defining an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

7. On the Talent Management home page for managers, the Switch Manager function appears by default. This function enables a manager to work as another manager (typically one lower in the management hierarchy) and access that manager's performance-management tasks. To disable this function, personalize the Talent Management home page to remove the Switch Manager button.

8. When the application creates appraisals automatically from a Performance Management Plan or you run the Mass Appraisal Creation for WPM program, some errors are likely to occur and are to be expected. Therefore, you *must* set the action parameter Maximum Errors Allowed (MAX\_ERRORS\_ALLOWED) to a value that is realistic for the volume of data. Otherwise, the appraisal-creation process may fail.

**Note:** If your enterprise also runs payroll processes, Maximum Errors Allowed may already be set to an appropriate value.

To access the Action Parameters window, select Action Parameters from the Other Definitions menu.

# Performance Management Plans

## Performance Management Plans

The Performance Management Plan (PMP) defines the performance-management process for a specified period, such as a calendar year. It identifies:

- Who is a member of the plan
- Whether and how you will set objectives for plan members
- Whether the application will create appraisals automatically for plan members
- The tasks workers and managers will perform throughout the process

HR Professionals create and manage the PMP using the Performance Management Plans function.

## Specifying General Information

On the Create Plan: General Information page, you specify the:

- Plan name. As this name is also the name of each personal scorecard, devise a meaningful naming standard to identify the plan clearly.
- Plan administrator, who manages the plan (who can update it, for example) and is the signed-on user, by default. You can select a different administrator from the list of people your security profile enables you to access.

**Note:** If you are the plan administrator but are not a member of the plan, the plan does not appear automatically in your Talent Management Task List. You can use the Switch Manager function to access the plan as a manager who is a plan member.

- Previous plan. Provide this value if you want personal scorecards to include incomplete objectives from a previous plan.
- Plan start and end dates. These dates define the performance-management period.

You can also identify attachments to appear in each personal scorecard. For example, you could include information about defining SMART (specific, measurable, achievable, realistic, and time-based) objectives or a document about the enterprise goals. Note that, when you duplicate a plan, the application does not duplicate attachments.

## Selecting the Plan Population

On the Create Plan: Population page, you identify the plan members by selecting part or all of a hierarchy (for example, an organization hierarchy). For workers belonging to this hierarchy, HRMS automatically generates personal scorecards of objectives when you publish the plan.

See: Personal Scorecards, page 5-57

## Specifying the Plan Process

On the Create Plan: Process page, you tailor the performance-management process to suit enterprise requirements. Briefly, you can:

- Include both objective setting and automatic appraisal creation.
- Exclude objective setting.
- Exclude automatic appraisal creation.

## Including both Objective Setting and Appraisal Creation

For the objective-setting process, you can specify:

- When objective setting must occur. The objective-setting period must be:
  - The same as or wholly within the plan period
  - Complete before any appraisal-task start date

The objective-setting period is usually at the start of the performance-management period. If you also select Allow Changes Outside This Period, workers and managers can update personal scorecards after the end of the objective-setting period. In this case, the end date of the objective-setting period is a proposed deadline only.

- Whether you will use the cascading or parallel objective-setting process. This selection determines who starts the objective-setting process (managers or workers).

See: Cascading Objectives, page 5-48

See: Setting Objectives in Parallel, page 5-51

- Whether personal scorecards will automatically include objectives from the Objectives Library for which workers are eligible.

See: Allocating Objectives Automatically, page 5-53

- Whether personal scorecards will include incomplete objectives (objectives with no achievement date). The application looks for these objectives from either the previous scorecard (identified on the Create Plan: General Information page) or a worker's latest appraisal, provided the application generated the appraisal automatically from the previous PMP identified on the Create Plan: General Information page.

- Whether sharing and alignment of objectives are enabled. These features enable workers to construct a hierarchy of related objectives.

See: Sharing and Aligning Objectives, page 5-55

When you publish the plan, the application generates objective-setting and objective-tracking tasks for plan members.

If you select Include Appraisals in Process, the application can create appraisals automatically for plan members. In a single PMP, you can define multiple appraisal tasks. For example, you can define midyear and full-year appraisals. For each appraisal task, you can:

- Select an appraisal template.
- Specify when the application will generate the appraisals, by setting Create Appraisals to Yes and entering the number of days before the start of the appraisal task.
- Specify whether the application will allocate appraisals to the main appraiser or the appraisee.

For each appraisal, the task start date must be after the appraisal-period start date.

The application automatically configures the Objectives section of the appraisal using the objective-assessment template identified in the appraisal template, and populates the Objectives section with the worker's personal scorecard.

When you publish the PMP, the application generates appraisal-process tasks for plan members and schedules a concurrent process to create appraisals on the specified dates, if appropriate.

If you set Create Appraisals to No, the application does not create appraisals automatically for this plan. Instead, you can run the Mass Appraisal Creation for WPM program at a convenient time.

See: Running the Mass Appraisal Creation for WPM Program, page 5-42

### **The Appraisal Template**

The appraisal template that you select must identify an objective-assessment template. Otherwise, HRMS cannot configure the Objectives section of the appraisal. Appraisal and assessment templates must be valid throughout the appraisal period.

See: The Appraisal Template, page 5-87

### **Excluding Objective Setting**

If you do not include objective setting in your PMP, when you publish the plan the application:

- Generates personal scorecards and populates them with any incomplete objectives and automatically-allocated objectives. The scorecard status is Published.
- Does *not* generate objective-setting and objective-tracking tasks but does generate appraisal-process tasks.
- Generates appraisals on the specified dates, if you have set Create Appraisals to Yes. Otherwise, you can run the Mass Appraisal Creation for WPM program at a convenient time. The Objectives section of the appraisal includes personal scorecards as generated on plan publication.

### **Excluding Appraisal Creation**

If you do not include appraisal creation in your PMP, when you publish the plan the application:

- Generates personal scorecards and populates them with any incomplete objectives and automatically-allocated objectives
- Does not generate appraisal-process tasks but does generate objective-setting and objective-tracking tasks
- Does not create appraisals automatically

You cannot run the Mass Appraisal Creation for WPM program to create appraisals for this plan.

If you create appraisals individually using the SSHR Appraisals function, the configuration of the Objectives section depends on the appraisal template you select. The application does not copy a worker's personal scorecard to the Objectives section as there is no link between personal scorecards and appraisals created outside the PMP.

## Reviewing the Plan

The Create Plan: Review page shows the tasks HRMS will generate for workers and managers when you publish the plan. The list of tasks varies according to configuration options selected on the Create Plan: Process page. For example, if you do not include objective setting in your performance-management process, the application does not generate objective-setting tasks.

## Publishing the Plan

A Performance Management Plan has no effect until you publish it. When you publish the plan, HRMS automatically generates personal scorecards for all plan members and a list of tasks to guide plan members through the performance-management process.

See: Personal Scorecards, page 5-57

See: Manager Performance-Management Tasks, page 5-60 and Worker Performance-Management Tasks, page 5-63

**Note:** Once you publish a plan, you cannot delete or deactivate it. Although you can update some parts of a published plan, you cannot make major revisions. Therefore, ensure your Performance Management Plan is complete and correct before you publish it.

## Monitoring the Plan

Once a plan is published, you can use the Performance Management Plans function to monitor the status of scorecards and appraisals generated by the plan.

## Updating the Published Plan

You can update a published plan, though there are significant restrictions on the changes you can make.

See: Updating the Performance Management Plan, page 5-39

## Updating Performance Management Plans

You can update a published Performance Management Plan (PMP) and republish it to disseminate relevant changes to plan members. For example, if you update a published plan to include objective setting, the application generates personal scorecards and objectives-related tasks when you republish the plan. However, some restrictions apply to the changes that you can make.

## Items You Can Change in a Published PMP

On the Create Plan: Process page, you can:

- Select, but not deselect, any of the following options:
  - Include Objective Setting in Process
  - Sharing and Alignment (if you also select Include Objective Setting in Process)
  - Include Appraisals in Process
  - Allow Changes Outside This Period

- Automatic Allocation
- Copy Previous Objectives
- Notify Plan Population
- Change the objective-setting start date, provided that neither the current date nor the new date is in the past.
- Change the objective-setting deadline date.
- Change Task Start Date in the Appraisals region, provided that the current date is not in the past and the new date is at least two days in the future.
- Change Task End Date in the Appraisals region.
- Add or delete an appraisal up to two days before that appraisal's Task Start Date, if Create Appraisals is set to Yes (indicating that the application is scheduling appraisal creation). If Create Appraisals is set to No, you can add or delete an appraisal provided that you have not already run the Mass Appraisal Creation for WPM program.

On the Create Plan: General Information page, you can update the flexfield and any attachments. You cannot update the Create Plan: Population page in a published plan.

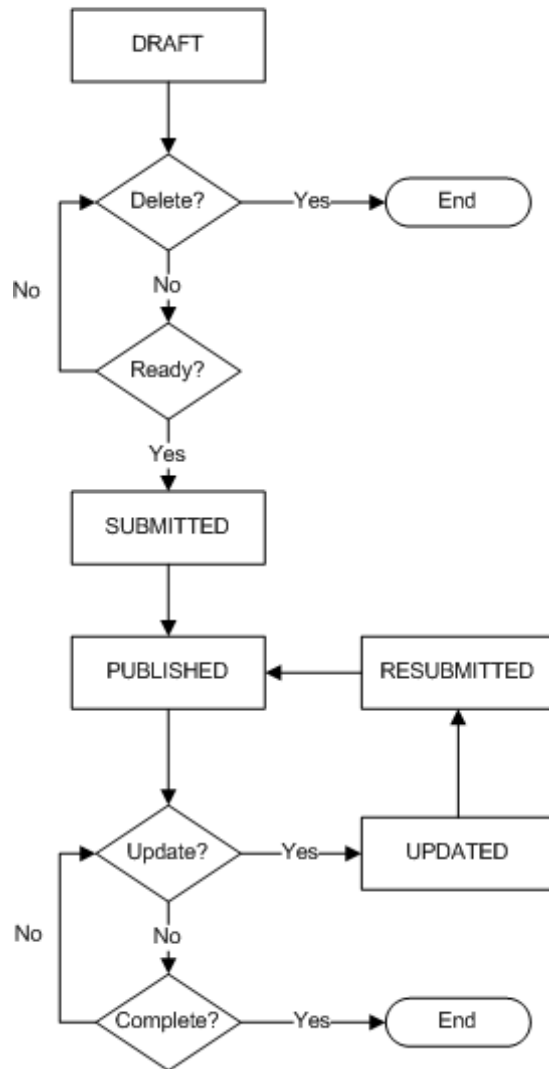
When you republish the plan, the application can apply changes made to objectives in the Objectives Library since the plan was first published to personal scorecards.

See: Updating Objectives, page 5-46

## Status Values of Performance Management Plans

The following figure summarizes the Performance Management Plan's status values:

## Performance Management Plan Status Values



### Draft

When you create a PMP, its status is Draft. You can update a plan in draft status as often as necessary. You can also delete a draft plan.

### Submitted

When you publish a draft plan, its status changes immediately to Submitted. A concurrent program performs the publication process, and the plan status remains Submitted until the program completes.

### Published

When the publication process completes, the plan status changes to Published. At this point, the plan takes effect. You cannot delete a published plan.

## Updated

If you update a published plan, its status changes to Updated. The status remains Updated until you publish the plan again.

## Resubmitted

When you publish an updated plan, its status changes to Resubmitted. When the republication process completes, the plan status changes to Published.

## Running the Mass Appraisal Creation for WPM Program

HRMS can automatically create appraisals for all members of a Performance Management Plan (PMP) on the date specified in the plan. Alternatively, you can run the appraisal-creation process independently of the PMP.

### **To run the Mass Appraisal Creation for WPM program:**

1. In the Name field, select Mass Appraisal Creation for WPM.  
The Parameters window opens.
2. In the Effective Date field, enter the date on which the application is to create appraisals.
3. In the Performance Plan field, select the plan for which you are creating appraisals.
4. In the Appraisal Template field, select the relevant appraisal template. If the plan includes only one combination of appraisal template and appraisal period, the appraisal template name appears here automatically.
5. In the Log Output field, select Yes to create a log file of the appraisal-creation process.

HRMS creates appraisals for all plan members and allocates them to the initiator identified in the PMP.



# Objectives

## The Objectives Library

The Objectives Library is a collection of reusable objectives that you create and maintain using the Objectives Library function. This function enables you to manage the enterprise objective-setting process efficiently. For example, you can:

- Define objectives consistently.
- Control the availability of objectives by specifying validity dates.
- Group objectives into locally defined categories for ease of retrieval.
- Establish naming standards for objectives.
- Allocate objectives automatically to eligible workers by means of the Performance Management Plan.

Managers and workers can search the library for objectives to include in personal scorecards.

## Creating and Updating Objectives

Using the Objectives Library function, you can create objectives to include in the library. You can identify objectives in the library for automatic allocation to eligible workers.

See: Creating Objectives, page 5-44

Some values that you define for objectives in the library, such as the target completion date and the weighting value, are default values only. Workers and managers can update such values when the objective appears in a worker's personal scorecard.

See: Updating Objectives, page 5-46

## Duplicating Objectives

You can make a copy of an objective already in the library to provide multiple versions of the same objective, perhaps with different validity dates or measures. However, for any objective in the library, the combination of name and validity dates must be unique. The application does not duplicate objective attachments.

## Deleting Objectives

If you delete an objective from the objectives library that HRMS has allocated automatically to eligible workers, HRMS can also remove the objective from the personal scorecards of those workers, provided that they have not already achieved the objective. This action requires your confirmation. In all other cases, deleting objectives from the objectives library has no effect on their inclusion in existing personal scorecards.

## Importing Objectives

Instead of creating objectives individually, you can import them to the Objectives Library from a spreadsheet using Oracle Web ADI. This function enables you to import objectives definitions from other performance-management processes, for example. You

can also update such objectives as a group (for example, you can set all validity dates at once) before uploading them to HRMS.

## **Creating Objectives**

HRMS supports the following ways of creating objectives:

- HR Professionals can define reusable objectives in the Objectives Library.
- Managers can define individual objectives for workers.
- Workers can define individual objectives for themselves.

### **Creating Objectives in the Objectives Library**

To create objectives in the Objectives Library, you use the Objectives Library function. When you define the objective, you can specify the following values:

Value	Description
Validity Dates	Outside these dates, you cannot allocate the objective to a worker. You can use these dates to tie an objective to a particular performance-management period (for example, a calendar year). You must specify validity dates if you intend to allocate the objective to workers automatically. If you specify no Valid To date, the objective is available until you delete it.
Next Review Date	You can trigger alerts using this date to remind workers and managers that an objective needs review. This date is a default value that you can change for individual workers.
Target Date	Workers must achieve the objective by this date. This date is a default value that you can change for individual workers.
Group	You can use this value to group objectives into types (for example, Communication, Management, and Team Leading). Users can search the Objectives Library for objectives in a particular group.
Priority	You can assign a relative priority to an objective (for example, low, medium, or high). Users can specify a priority value when searching the Objectives Library.
Include in Appraisals	If you select this value and HRMS creates appraisals automatically, the objective appears by default in the Objectives section of the appraisal of any worker who has the objective. You can update this selection for individual workers.
Weighting	The weighting value is an integer from a locally defined scale (for example, 1 through 5). It specifies the importance of this objective to the enterprise relative to other objectives. HRMS uses this value when calculating objective scores during appraisals. You can update this value for individual workers.

For information about the Measurement tab, see *Measuring Objectives*, page 5-47.

For information about the Eligibility tab, see *Allocating Objectives to Workers Automatically*, page 5-53

You can identify attachments for objectives. Note that, if you duplicate an objective, the application does not duplicate the objective's attachments.

## Creating Individual Objectives

If you are a manager, you create individual objectives for workers using the Cascade or Set Objectives task. If you are a worker, you create individual objectives for yourself

using the Set Objectives task. Managers and workers can also create individual objectives in the Objectives section of the appraisal.

The definition of an individual objective is the same as the definition of an objective in the Objectives Library, except that an individual objective:

- Is for one worker only  
You cannot store individual objective definitions in the Objectives Library.
- Does not have validity dates  
Its validity is that of the personal scorecard to which you add the objective.
- Has the following tracking values:
  - Start Date  
This is the date from which the worker owns the objective.
  - Complete %  
The worker or manager enters a percentage-complete value to record progress.
  - Achievement Date  
When the Complete % value is 100, the worker or manager enters the achievement date.
  - Actual (for quantitative measures)  
The worker or manager completes this field for objectives with target values.
  - Verified (for qualitative measures)  
The manager selects this option to confirm that an objective is complete.

These values are disabled when you create the objective. They are enabled from the worker and manager View and Track Objective Progress tasks.

See Tracking Objectives, page 5-56

## Updating Objectives

Whether and when you can update an objective depends on whether the objective is in the Objectives Library.

### Updating Objectives in the Objectives Library

You can update objectives in the Objectives Library at any time. However, the effects of a change depend on whether the application has allocated the objective to workers automatically.

### Updating Objectives Without Eligibility Profiles

If you create an objective in the Objectives Library but do not define eligibility criteria, the application does not allocate the objective to workers automatically. Managers and workers can, however, search the library for these objective definitions and include them in personal scorecards.

You can update these objectives at any time. Changes that you make to objectives in the Objectives Library do not affect objectives already copied to personal scorecards, as there is no link between the two versions of the objective. For example, if you change

the validity dates of an objective in the Objectives Library, the validity dates of the same objective in existing personal scorecards are unaffected. Similarly, if you delete an objective from the Objectives Library, it remains in existing personal scorecards.

### **Updating Objectives with Eligibility Profiles**

If you update an objective that has eligibility criteria, the application reassesses worker eligibility for the objective if you republish the relevant Performance Management Plan (PMP).

If you have not changed the objective's eligibility criteria, the application updates the objective in personal scorecards. This action may overwrite changes that managers or workers have made to the objective in the personal scorecard. For example, if you update an objective's default weighting value, the new value replaces weighting values set for individual workers.

If you have changed the objective's eligibility criteria, the application can allocate the objective to newly eligible workers immediately (subject to your confirmation). At the same time, the application can remove the objective from the personal scorecards of workers who are no longer eligible, provided that they have not already achieved the objective.

If you delete an objective that has eligibility criteria and is still valid (its valid-to date is in the future), the application deletes the objective from the personal scorecards of workers who have not already achieved the objective. This action is subject to your confirmation.

### **Updating Individual Objectives**

Individual objectives are outside the Objectives Library and apply to individual workers. During the objective-setting period, you can update these objectives freely. Outside the objective-setting period, you can update individual objectives only if permitted. (The HR Professional must select Allow Changes Outside This Period in the PMP to allow you to update objectives outside the objective-setting period.) In this case, objective-setting tasks in worker and manager task lists remain enabled after the end date of the objective-setting period.

### **Updating Tracking Information**

Tracking information (such as % Complete and Achievement Date) is not part of an objective's definition. You can update tracking information throughout the performance-management period.

See: Tracking Objectives, page 5-56

### **Measuring Objectives**

When you define an objective, you can identify a measurement style. This value enables you to judge whether a worker has achieved an objective.

HRMS defines two measurement styles for objectives: quantitative and qualitative.

### **Quantitative Measurement**

You select a quantitative measurement style for objectives with outcomes that you can measure in numerical terms. For these objectives, you specify a target value, a unit of

measure (UOM), and a type. These example objectives have quantitative measurement styles:

Objective	Target	UOM	Type
Increase sales revenue	10	Percent	MIN
Reduce department costs	10,000	U.S. Dollars	MAX
Sell and install complete kitchens	30	Number	MIN

## Qualitative Measurement

You select a qualitative measurement style for objectives with outcomes that you cannot assess in numerical terms. For example, objectives related to skill development or improvement of worker morale would require a qualitative measurement style. Achievement of this type of objective needs assessment and verification by a worker's manager, for example. For these objectives, managers can indicate, using the View and Track Objective Progress task, that they have verified achievement of the objective. These example objectives require a quantitative measurement style:

- Improve merchandise-display skills.
- Develop viable customer loyalty scheme.
- Manage successful merger of main and subsidiary procurement teams.

## Tracking and Assessment of Objectives

Having defined a measurement style for an objective and allocated the objective to a worker, you can track the worker's progress throughout the performance-management period. For example, if a retail manager's objective is to train team members in merchandise display and the target value is 100 percent, after three months the actual value may be 15 percent, after six months 25 percent, after nine months 40 percent, and after 12 months 70 percent. The worker's manager can review progress at any time and take remedial action, if appropriate.

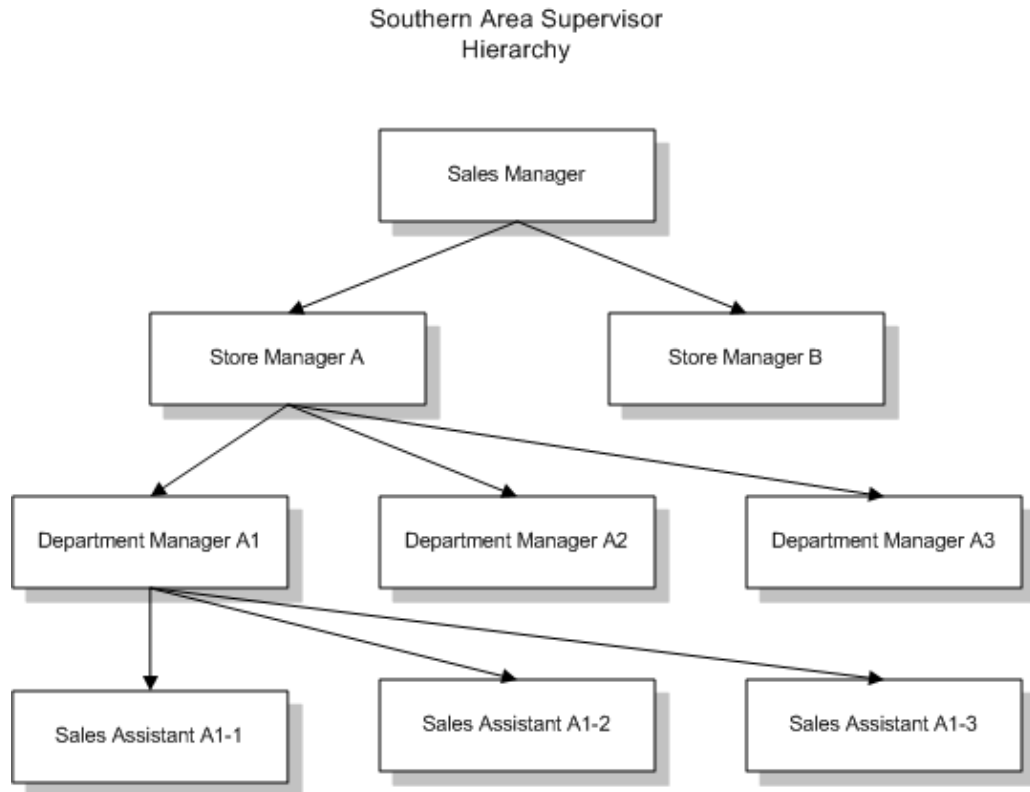
See: Tracking Objectives, page 5-56

During a worker's appraisal, appraisers can assess a worker's *performance* in the delivery of his or her objectives. Assessment is a separate activity from tracking, and while failure to achieve objectives may also indicate poor performance, the relationship is not fixed.

See: Assessing Competencies and Objectives, page 5-91

## Cascading Objectives

The HR Professional identifies the population of a Performance Management Plan (PMP) by selecting part or all of a hierarchy structure. For example, all workers in an organization hierarchy or all workers in two levels of a five-level supervisor hierarchy could be the members of a particular PMP. The following figure shows an example supervisor hierarchy whose workers belong to the PMP Southern Area Sales 2008.



To allocate the enterprise objectives in some form to all enterprise workers, you can use the cascading-objectives process. The top manager in the plan hierarchy (the sales manager, in our example), prompted by the PMP task Cascade or Set Objectives, begins the process by setting his or her *own* objectives using Employee Self-Service. Typically, the manager bases these objectives on the enterprise objectives. In this example, the sales manager has the following objectives:

Objective	Target	Unit of Measure	Type
Increase sales revenue	500,000	USD	Minimum
Develop customer awareness	N/A	N/A	N/A

To cascade these objectives to the store managers, the sales manager can:

- Allocate them to the store managers and adjust the targets, if appropriate. For example, the sales manager can allocate the objective to increase sales revenue to both store managers. For store manager A, the target is 275,000.00 USD, and for store manager B, the target is 300,000.00 USD.
- Create new objectives for either or both store managers. For example, to cascade the objective to develop customer awareness, the sales manager can create the new objective Conduct Customer Survey for store manager A and Devise Customer Loyalty Scheme for store manager B.

The store managers repeat this process for their department managers, who repeat it in turn for their sales assistants. For example, store manager A can cascade the objective

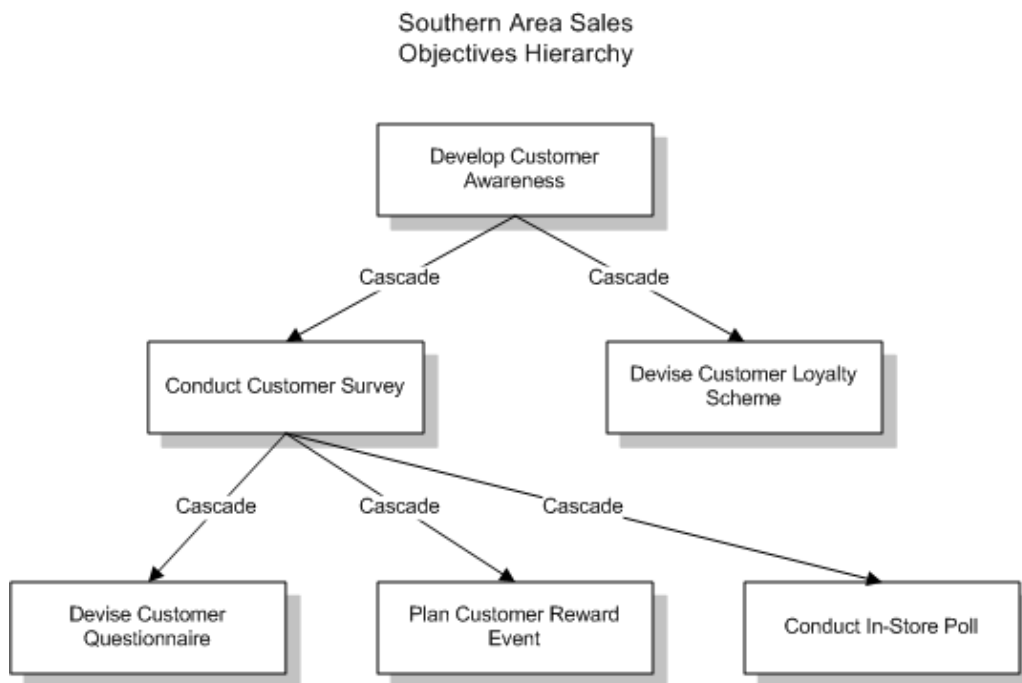
Conduct Customer Survey to the three department managers by defining three new objectives:

1. Devise customer questionnaire.
2. Plan customer reward event.
3. Conduct in-store poll.

Once the store manager has set these supporting objectives for the department managers, they can, in turn, cascade their objectives to the sales assistants who report to them.

The effect of the cascading process is to define a hierarchy of objectives, where each level comprises supporting objectives for the objectives at the next level.

The following figure shows the objectives hierarchy from our example:



The supporting objectives are automatically aligned with the objectives above them in the hierarchy.

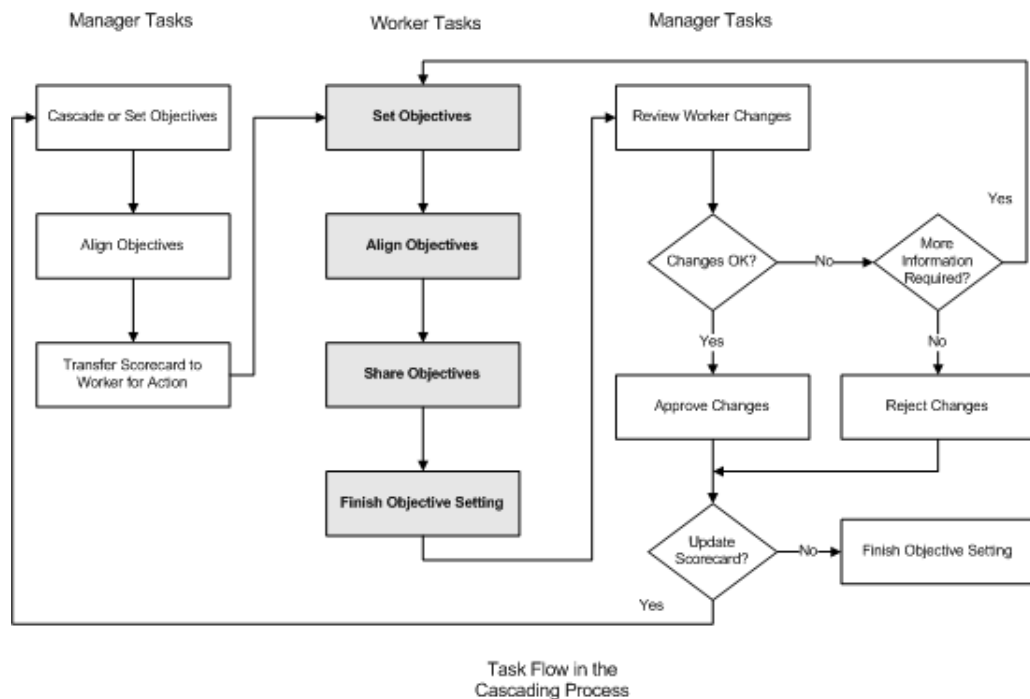
Note that, for each worker in the hierarchy, the cascading process is just one way of setting objectives. Managers can also set nonsupporting objectives for workers, and workers can set their own objectives. You can use all methods in a single PMP.

## Task Flow in a Cascading Process

In the PMP, the HR Professional can select either cascading or parallel objective setting. In a cascading process, managers start objective setting; in a parallel process, workers start objective setting.

The following figure summarizes the flow of control between managers and workers in a cascading process. The process starts with the manager task Cascade or Set Objectives.





For information about the tasks shown in this figure, see Manager Performance-Management Tasks, page 5-60 and Worker Performance-Management Tasks, page 5-63

For information about the parallel process, see Setting Objectives in Parallel, page 5-51

## Setting Objectives in Parallel

If the HR Professional selects the parallel objective-setting process in the Performance Management Plan (PMP), workers start the objective-setting process. By contrast, in the cascading process, managers start the objective-setting process.

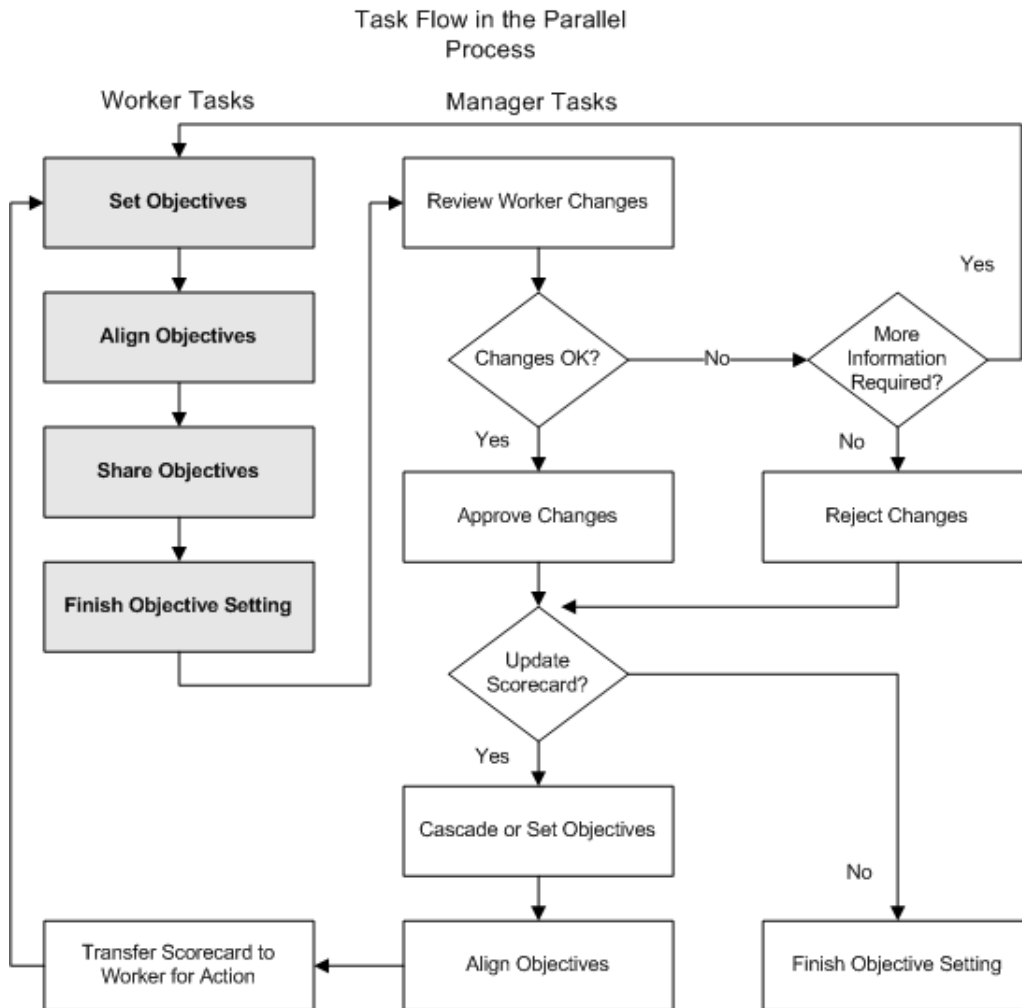
When the application generates personal scorecards, they contain objectives automatically allocated to workers or copied from their previous appraisals or personal scorecards. In the parallel process, workers, prompted by the PMP task Set Objectives, update their personal scorecards before passing control of the scorecards to their managers. The managers can then review their workers' personal scorecards before making any additional changes.

In enabling workers to drive the objective-setting process, the parallel method may be most useful to enterprises that use matrix management rather than traditional management hierarchies.

Although the flow of control between managers and workers varies with the process (cascading or parallel), the tasks that managers and workers can perform are the same. For example, even when using the parallel objective-setting process, managers can still cascade objectives to workers. Similarly, when using the cascading process, managers do not have to cascade objectives to their workers.

## Task Flow in a Parallel Process

The following figure summarizes the flow of control between managers and workers in a parallel objective-setting process. The process starts with the worker task Set Objectives.



For information about the tasks shown in this figure, see Manager Performance-Management Tasks, page 5-60 and Worker Performance-Management Tasks, page 5-63

For information about the cascading process, see Cascading Objectives, page 5-48

## Allocating Objectives to Workers Automatically

When you create an objective in the Objectives Library, you can specify who will receive the objective automatically by associating the objective with an eligibility profile. To create the eligibility profile, you use the Eligibility Profiles function.

When you publish a Performance Management Plan (PMP), members of the plan population automatically receive the objective in their personal scorecards if:

- They satisfy the objective's eligibility requirements.
- The objective's validity dates are the same as or wholly within the PMP dates.

## How Updating the PMP Affects Automatic Allocation

If you update and republish a published PMP, HRMS reassesses plan members' eligibility for library objectives. As a result, the application may remove some objectives from personal scorecards and add others.

See: Updating Objectives, page 5-46

## Creating New Objectives After Plan Publication

In some circumstances, HRMS can allocate objectives to eligible workers *after* you first publish a plan. That is, if you define an objective with eligibility criteria and the objective's dates are the same as or wholly within those of a published, ongoing plan, HRMS assesses the eligibility of the plan population for the new objective and automatically adds it to the personal scorecards of eligible workers if you republish the plan.

## Allocating a Single Objective to Workers in Multiple Business Groups

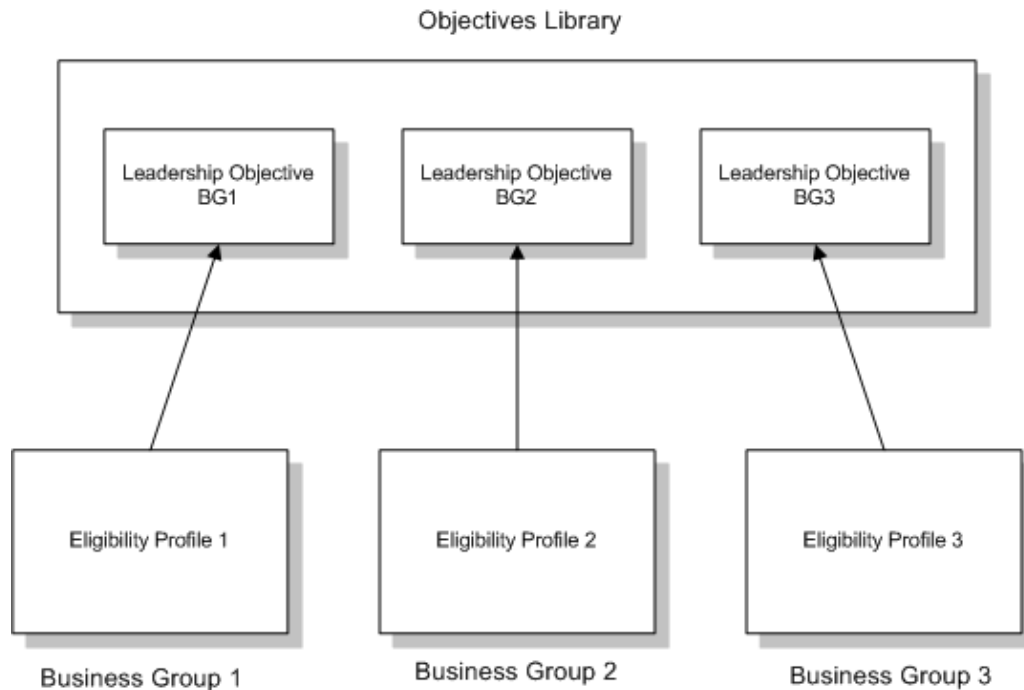
If you have access to the Objectives Library function, you can:

- View *all* objectives in the Objectives Library.
- Use any existing eligibility profile, regardless of business group, in an objective definition in the Objectives Library.

As eligibility profiles are business-group specific, an eligibility profile you define in one business group is unavailable for use in other enterprise business groups. Therefore, when you associate an objective with an eligibility profile, you effectively restrict automatic allocation of that objective to a single business group.

To allocate an objective automatically to workers in multiple business groups, you create a version of the objective for each business group by duplicating the objective in the Objectives Library. In each version of the objective, identify an appropriate eligibility profile. Remember also to ensure that each combination of objective name and validity dates is unique in the Objectives Library. As you can see all objectives in the Objectives Library and all enterprise eligibility profiles, you can perform this task without switching responsibilities.

The following figure shows the relationship between business-group-specific eligibility profiles and objectives in the Objectives Library.



## An Automatic-Allocation Example

Automatic allocation results for this objective appear in the following table:

- The objective name is Attend Retail Management Seminar Level 3.
- The objective validity dates are 01/01/2007 to 12/31/2007.
- Workers whose job title is department manager are eligible for this objective.

Employee	Job	PMP	Plan Start	Plan End	Receives Objective?
A	Department Manager	Performance Plan 2007	01/01/2007	12/31/2007	Yes
B	Supervisor	Performance Plan 2007	01/01/2007	12/31/2007	No
C	Department Manager	Objectives Plan 2006 - 2008	09/01/2006	03/31/2008	Yes
D	Department Manager	Objectives Plan 2006 - 2007	06/01/2006	05/31/2007	No

- Employee A receives this objective automatically because he is a department manager and the objective's validity dates are the same as those of the PMP to which he belongs.
- Employee B does not receive this objective because, even though she belongs to the same PMP as Employee A, she is not a department manager and therefore fails to meet the eligibility criteria.

- Employee C receives this objective automatically because he is a department manager and the objective's validity dates are wholly within those of the PMP to which he belongs.
- Employee D does not receive this objective because, although she is a department manager, the objective's validity dates are outside those of the PMP to which she belongs.

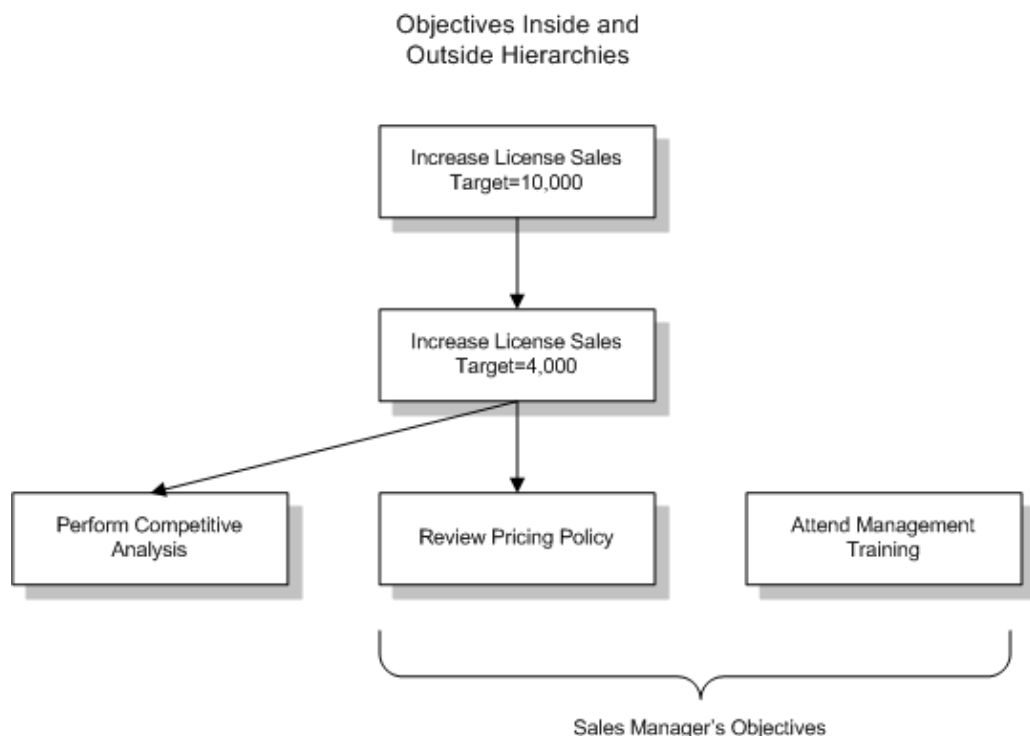
## Sharing and Aligning Objectives

You can build hierarchies of objectives, with objectives at lower levels in the hierarchies supporting those immediately above them. Objectives at lower levels, known as *supporting objectives*, are said to be *aligned* with those objectives that they support. Supporting objectives:

- Can be identical to the objectives that they support, perhaps with different targets, or they can be completely different
- Do not have to have the same measurement style as the objectives that they support

Not all objectives need to belong to an objectives hierarchy. Typically, personal objectives remain outside hierarchies. You can delete objectives that belong to objectives hierarchies without causing errors.

The following figure shows objectives inside and outside a hierarchy:



In this figure, the objectives at the first two levels of the hierarchy are identical; at the third level, objectives are different from the objective that they support. The sales manager has two objectives, but only one, Review Pricing Policy, aligned with Increase License Sales, belongs to an objectives hierarchy. The sales manager is unaware of the objective Perform Competitive Analysis.

## Ways of Constructing an Objectives Hierarchy

When managers cascade objectives to workers who report to them, they create supporting objectives that are automatically aligned with the cascaded objective. Workers and managers can also create relationships between objectives manually. Before you can align an objective with a different objective:

- The HR Professional or manager must have enabled sharing and alignment in the Performance Management Plan (PMP).
- The objective's owner must have *shared* the objective with you and permitted alignment.

## Sharing Your Objectives

You can share any of your objectives with other members of the PMP. If you allow others to view an objective, they can view its detail but not align their objectives with it. If you allow others both to view and to align, they can define supporting objectives for the shared objective.

For example, if you share the objective Improve Supplier Relationships with four coworkers, each coworker can define a supporting objective and align it with your objective. You can view those supporting objectives only if security permissions give you access to your coworkers' personal scorecards.

Managers typically share objectives by cascading them, in which case sharing and alignment are automatic. Alternatively, managers can share objectives if they use Employee Self Service to perform the Share Objectives task.

## Aligning Your Objectives

When you align an objective, you define a relationship between your objective and an objective that another member of the PMP has shared with you. The Align Objectives page, accessed from the Align Objectives task, displays a list of people who have shared objectives with you; you can view details of each shared objective. Note that you can align an objective with only one other objective.

## Aligning Worker Objectives

When sharing and alignment are enabled, managers receive the Align Objectives task. This optional task enables you to align the objectives of workers who report to you with your own objectives. In the Alignment column, you can align each objective in a worker's personal scorecard with one of your own objectives. As you own these objectives, you do not have to share them with the worker first. You may want to perform Align Worker Objectives when workers have initiated the objective-setting process and have no access to shared objectives.

## Tracking Objectives

When the HR Professional publishes a Performance Management Plan (PMP), managers and workers who belong to the plan each receive the View and Track Objective Progress task. The task appears in the Talent Management Task List at the start of the performance-management period and is enabled throughout.

## Recording Progress

Workers can complete the following fields for each objective:

- Complete (%)
- Achievement Date

This field applies to 100 percent complete objectives only.

- Actual

This field applies to objectives with quantitative measurement styles (those with target values) only.

Managers can view a worker's reported progress using View and Track Objective Progress from the Talent Management Task List. They can also:

- Update a worker's progress.
- For objectives with the qualitative measurement style and against which the worker has recorded an achievement date, select the Verified option. This option indicates that the manager has confirmed that the objective is complete.

See: Measuring Objectives, page 5-47

Workers and managers can update progress as often as required throughout the performance-management period. Enterprises can require workers to update progress at regular intervals (for example, monthly) to maintain focus on objectives.

If the application creates appraisals automatically from the PMP, achievement dates recorded during the objective-tracking process appear automatically in the Objectives section of the appraisal.

## Personal Scorecards

A personal scorecard comprises the objectives of a single worker associated with a single Performance Management Plan (PMP). Workers who belong to more than one PMP have multiple personal scorecards. Also, a worker can have more than one personal scorecard from a single PMP if the worker has multiple assignments and the plan does not apply to primary assignments only.

The application generates a worker's personal scorecard when the HR Professional publishes the PMP. At that time, the scorecard status is either Not Started: With Manager or Not Started: With Worker, depending on the objective-setting method. In a cascading objective-setting process, managers start the updating process; in a parallel objective-setting process, workers start the objective-setting process.

See: Cascading Objectives, page 5-48 and Setting Objectives in Parallel , page 5-51

## Populating Personal Scorecards

When the application generates a personal scorecard, it can include:

- Objectives from the Objectives Library for which workers are eligible  
See: Allocating Objectives to Workers Automatically, page 5-53
- Incomplete objectives from a previous personal scorecard or appraisal

During the objective-setting period, both managers and workers can update workers' personal scorecards.

Ways of populating a personal scorecard during the objective-setting period include:

- Creating new, individual objectives
- Copying objectives from previous scorecards
- Copying shared objectives
- Copying objectives from the Objectives Library
- Duplicating objectives already in the scorecard
- Cascading objectives from managers to workers

You can also update and delete objectives in the personal scorecard. An objective's Created By field indicates who created the objective. The value Eligibility Criteria means that the application allocated the objective to you automatically.

The objective-setting process itself is task driven. Personal scorecards can transfer between managers and workers as often as necessary during the objective-setting period. At the end of the objective-setting period, managers publish the personal scorecards of workers who report directly to them.

See: Manager Performance-Management Tasks, page 5-60 and Worker Performance-Management Tasks, page 5-63

## **Monitoring Scorecard Status**

The HR Professional can monitor personal scorecards from creation to publication using the Performance Management Plans function. The Scorecard Summary for a plan shows the number of scorecards in each status. For example, the summary shows the number of personal scorecards that are With Worker and the number that are Published.

## **Viewing and Tracking Personal Scorecards**

Throughout the performance-management period, workers and managers perform the View and Track Objective Progress task to view personal scorecards and record progress against individual objectives.

See: Tracking Objectives, page 5-56

## **Personal Scorecards After the Objective-Setting Period**

After the end of the objective-setting period, you cannot alter the contents of the scorecard by updating, deleting, or adding objectives unless:

- The HR Professional alters the dates of the objective-setting period in the PMP.
- The HR Professional has explicitly enabled you, in the PMP, to make changes outside the objective-setting period. In this case, the end date of the objective-setting period is a proposed deadline only.

If the HR Professional creates, deletes, or updates an objective in the Objectives Library for which you are eligible, the application can also apply those changes automatically to your personal scorecard.

See: Updating Objectives, page 5-46



## Personal Scorecards in the Appraisal

Personal scorecards appear automatically in the Objectives sections of appraisals if:

- The application generates appraisals automatically.
- The appraisal template identified in the PMP includes an objective-assessment template.

Objectives appear in the Objectives section only if the Appraise option in the objective definition is selected; any objective for which Appraise is deselected does not appear.

During the appraisal, workers and managers can add, update, and delete objectives in the Objectives section of the appraisal.

**Note:** If the application does not create appraisals automatically, there is no automatic connection between the personal scorecard and the appraisal. In this case, you can transfer your objectives manually to the Objectives section of the appraisal, if appropriate.

## Personal Scorecards After Appraisals

The application automatically updates personal scorecards to match the Objectives sections of completed appraisals. For example, if you include an additional objective in the Objectives section during the appraisal, the application copies the new objective to your personal scorecard when the appraisal is complete. You can record tracking information for this new objective after the appraisal, and the objective appears in the Objectives section of subsequent appraisals during this performance-management period.

# Workforce Performance Management Task Lists

## Manager Performance-Management Tasks

Your Talent Management Task List includes an entry for each Performance Management Plan (PMP) to which you belong. Under each PMP entry appears a list of tasks that the application generates when the HR Professional publishes the PMP. The application enables these tasks at appropriate times during the performance-management period.

The tasks that you see and the order in which you perform them depend on configuration choices made in the PMP. For example, if the PMP includes appraisal creation, the application generates the Manage Appraisals task and allocates it to you. Otherwise, the task does not appear. Similarly, if the PMP uses the parallel objective-setting process, your first task is likely to be Review Worker Changes (as the worker starts the objective-setting process). If the PMP uses the cascading objective-setting process, your first task is likely to be Cascade or Set Objectives (as *you* start the objective-setting process).

This topic describes the manager performance-management tasks, the associated notification messages, and the Switch Manager function. The first five tasks described (Cascade or Set Objectives, Align Objectives, Transfer Scorecards to Workers for Action, Review Worker Changes, and Finish Objective Setting) are the objective-setting tasks and are enabled during the objective-setting period. (They are enabled after the objective-setting period only if the HR Professional has explicitly allowed you, in the PMP, to make changes outside the objective-setting period.)

## Cascade or Set Objectives

The Cascade or Set Objectives task enables you to set objectives for workers who report to you directly. You can:

- Add one or more objectives to each worker's personal scorecard by creating new objectives, copying objectives (from the Objectives Library, from the worker's previous scorecards, or from objectives shared with the worker), or duplicating objectives already in the personal scorecard.
- Cascade one or more of your own objectives to some or all of your team members. If you use this approach, you must first use Employee Self-Service to set your own objectives.

See: Cascading Objectives, page 5-48

You can use either or both of these approaches to update a single personal scorecard. Note also that you do not have to set objectives for workers, even though this task appears in your task list. A worker's personal scorecard may already include objectives that the application allocated automatically or copied from the previous personal scorecard or appraisal. You can simply transfer the scorecard to the worker without making further changes, if appropriate. You can also update or delete objectives already in a worker's personal scorecard.

You can perform this task only when the scorecard status is Not Yet Started: With Manager or With Manager. Changes that you make to personal scorecards are not visible to their owners until you perform the Transfer Scorecards to Workers for Action task.

## Align Objectives

The Align Objectives task enables you to define relationships between your workers' objectives and your own objectives. You may want to perform this task if you have already shared some of your objectives (using Employee Self-Service) with one or more of your team members and added supporting objectives to those workers' personal scorecards.

See: Sharing and Aligning Objectives, page 5-55

This task appears in your task list only if the plan administrator enables sharing and alignment in the PMP. You do not have to perform this task, even though it appears in your task list. Not all objectives must be aligned with other objectives. Also, this task is not relevant for objectives that you have allocated using the cascading process, as these objectives are automatically aligned with the objectives that you cascade.

## Transfer Scorecards to Workers for Action

When you have finished updating a worker's personal scorecard, you perform this task to transfer the scorecard to its owner. In the notification message, you can specify changes that the worker can make to the scorecard. When you perform this task, the scorecard status changes to With Worker.

You must perform this task if you have updated the worker's personal scorecard. You cannot perform the Finish Objective Setting task (which publishes the scorecard) if you have not first transferred the updated scorecard to its owner.

## Review Worker Changes

You perform the Review Worker Changes task as workers return their reviewed or updated personal scorecards to you for approval. This task lists all personal scorecards with changes that you have not yet reviewed and with a status of Approval Requested. You can:

- Approve all changes to the scorecard. The scorecard status changes to With Manager, and you can make further changes to the scorecard, if necessary.
- Request further action. In this case, the application returns the personal scorecard to the worker. In the notification message, you can specify any changes that you want the worker to make. The application changes the scorecard status to With Worker. When the scorecard status changes back to Approval Requested, you can review the scorecard again.
- Reject all changes to the scorecard. In this case, the application removes *all* changes that the worker has made to the scorecard. If that is not the desired effect, select the Request Further Action option. When you reject the worker's changes, the scorecard status changes to With Manager, and you can make further changes to the scorecard, if necessary.

**Note:** To publish the worker's scorecard, you must perform the Finish Objective Setting task. When you click Approve and Finish, the application takes you directly to that task.

## Finish Objective Setting

You perform this task once for each worker when you have finished the objective-setting and review processes. You can perform this task only if the scorecard status is With

Manager. You cannot perform this task (the task is disabled) if the scorecard contains changes that you have not transferred to the worker using the Transfer Scorecards to Workers for Action task. When you perform the Finish Objective Setting task, the scorecard status changes to Published.

**Note:** If you do not perform this task and appraisals are included in the PMP, any changes that you make to scorecards during the objective-setting process are lost when the application generates appraisals for the first appraisal period.

## View and Track Objective Progress

This task is enabled throughout the performance-management period. All personal scorecards, regardless of their statuses, are accessible from this task. You can:

- View a worker's personal scorecard by clicking the Details icon. If the worker is recording progress against objectives, you can view that information here.
- Update a worker's progress by clicking the Action icon. You can update any of the tracking fields (% Complete, Achievement Date, Actual, and Verified) for an objective.

**Note:** You select Verified when you have confirmed that the worker has achieved an objective whose measurement style is qualitative.

See: Measuring Objectives, page 5-47 and Tracking Objectives, page 5-56

## Manage Appraisals

The Manage Appraisals task appears in your task list only if the PMP includes appraisals. It occurs once for each appraisal task (each combination of appraisal template and appraisal period) identified in the PMP. For example, if the PMP identifies a midyear appraisal and a full-year appraisal, two Manage Appraisals tasks appear in the task list for that PMP.

The application enables this task on the appraisal-task start date specified in the PMP and disables it on the plan-end date.

**Note:** If you do not perform the Finish Objective Setting task before the appraisal-generation date specified in the PMP, the application discards all changes made to personal scorecards during the objective-setting period before changing the scorecard status to Published.

While this task is enabled, the application disables the objective-setting tasks. To manage objectives during an appraisal-task period, you use the Objectives section of the appraisal.

When you select this task, your Appraisals home page lists appraisals for PMP members for whom you are main appraiser. If the PMP identifies you as the appraisal initiator, you have ownership of the appraisal. If the appraisee is the initiator, you cannot update the appraisal until the appraisee first shares it with you.

See: The Appraisal Process, page 5-74

## Notification Messages

You receive notification messages when:

- The application generates your task list, if the plan administrator selects Notify Plan Population.
- Workers transfer their personal scorecards to you for approval.

You issue notification messages when:

- You transfer personal scorecards to workers.
- You publish workers' personal scorecards.

## Using the Switch Manager Function

You can access only PMPs to which you belong. If a worker who reports to you belongs to a PMP of which you are not a member, you can use the Switch Manager function to access that worker's personal scorecard. Your security profile must give you access to the target manager.

Note that the Switch Manager function is enabled by default, but may be disabled in your enterprise.

## Worker Performance-Management Tasks

Your Talent Management Task List includes an entry for each Performance Management Plan (PMP) to which you belong. Under each PMP entry appears a list of tasks that the application generates automatically. The tasks are those appropriate to the PMP and can vary from one PMP to another. The application enables these tasks at appropriate times during the performance-management period. For example, you can perform the appraisal-management task during the appraisal-task period only.

If you have multiple personal scorecards for the same PMP (because you have multiple assignments), use the Switch Assignment task in the task list to display the task list for each assignment. You may report to a different manager or supervisor in each assignment.

This topic describes all worker performance-management tasks and their associated notification messages.

## Set Objectives

The Set Objectives task enables you to update your personal scorecard of objectives. This task is usually enabled during the objective-setting period only. The dates of this period appear in the task's Start Date and End Date columns in the Talent Management Task List. The scorecard status must be either With Worker or Not Started: With Worker.

- The scorecard status is With Worker if your manager started the objective-setting process and has transferred your personal scorecard to you. You receive a notification message that may include your manager's instructions for updating the scorecard.
- The scorecard status is Not Started: With Worker if you are starting the objective-setting process. The scorecard may already contain some objectives that the application allocated to you automatically or copied from a previous appraisal or personal scorecard.

You can update your personal scorecard by:

- Creating new objectives
- Copying objectives from the Objectives Library, from your previous scorecards, or from shared objectives (objectives that others have shared with you)
- Duplicating objectives already in the scorecard and updating them (for example, to change the objective name)
- Updating objectives already in the scorecard

You can also review any objectives that others (typically your manager) have shared with you. Having access to shared objectives enables you to define supporting objectives. For example, if your manager shares the Increase Sales of Electrical Goods objective, you can define an objective that will contribute to the shared objective (but does not have to be identical to it). For example, your objective could be Redesign Sales Area for Electrical Goods. You make the relationship between the two objectives explicit when you perform the Align Objectives task.

## Align Objectives

The Align Objectives task enables you to define relationships between any of your objectives and objectives that others (such as your manager) have shared with you. For each supporting objective in your personal scorecard, you select the shared objective that it supports in the Aligned To column. If you have defined no supporting objectives, you do not need to perform this task.

If it appears, this task is usually enabled during the objective-setting period only. This task does not appear if sharing and alignment are not required activities.

## Share Objectives

The Share Objectives task enables you to give other members of the PMP access to your objectives. You can allow others to:

- View an objective.
- View an objective and align their objectives with it.

Enterprise policy determines whether you must perform this task and for which objectives. For example, if you are a manager, you can use Employee Self-Service to share objectives with your team as an alternative to the cascading process. If matrix-management structures are in place, you may need to share objectives with particular coworkers.

If it appears, this task is usually enabled during the objective-setting period only. This task does not appear if sharing and alignment are not required activities.

## Finish Objective Setting

When you have finished updating your personal scorecard, you perform the Finish Objective Setting task to transfer the scorecard to your manager for approval. In the notification message, you can explain any changes that you have made. The scorecard status changes to With Manager, and you can make no further changes unless your manager returns the scorecard to you. If this happens, you receive a notification message from your manager.

This task is usually enabled during the objective-setting period only.

## View and Track Objective Progress

The View and Track Objective Progress task enables you to view your personal scorecard and record progress against your objectives. For incomplete objectives, you can update the % Complete, Achievement Date, and Actual values. (You can enter an achievement date only for objectives that are 100 percent complete.) Your manager can review values that you enter here.

## Manage Appraisals

The Manage Appraisals task enables you to review and update your own appraisal and is enabled from the start of the appraisal-task period to the plan-end date. The dates of the appraisal-task period appear in the task's Start Date and End Date columns in your Talent Management Task List. While this task is enabled, all objective-setting tasks are disabled. (During appraisal activity, you can update your objectives in the appraisal rather than in your personal scorecard.) If multiple appraisals (for example, midyear and full-year appraisals) occur during a single performance-management period, this task appears once in your Talent Management Task List for each appraisal.

If you are the appraisal initiator, you see the appraisal on your Appraisals home page with the status of Planned at the start of the appraisal-task period. If your manager is the appraisal initiator, you receive a notification message when your manager shares the appraisal with you.

## Performance-Management Notification Messages

You receive performance-management notification messages when:

- Your manager transfers your personal scorecard to you.
- Another member of the PMP shares an objective with you.

You may also receive a notification message when the application generates your task list.

You issue notification messages when:

- You transfer your personal scorecard to your manager.
- You share your objectives with other members of the PMP.

In some cases, you can enter your own text in a message; in others, the application generates the message automatically using standard notification text.

# Qualifications

## Qualification Types

Oracle HRMS enables you to record the types of qualifications recognized by your enterprise, including:

- Educational and vocational qualifications
- Licenses
- Awards
- Honors

*Qualifications Framework qualifications* result from the achievement of unit standard competencies. For this type of qualification, you record national Qualifications Framework details, including the number of credits attached to the qualification, the awarding body, and the field of learning to which the qualification belongs.

You can rank qualifications. For example, you could rank a doctorate as 1, a master's degree as 2, a bachelor's degree as 3, and so on. You can rank equivalent qualifications at the same level. For example, you could rank both a bachelor's degree and a vocational qualification as level 3. This option is useful for identifying all workers qualified at level 3 or above, for example.

## Schools and Colleges

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

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

**Note:** As schools and colleges you enter are available to all business groups, you have to load or enter them once only.

## Creating Qualification Types

Use the Qualification Types window to create the qualifications that are recognized by your enterprise.

Before you start this task, you must define generic qualification types (such as Degree, Diploma, and License) as values for the lookup type PER\_CATEGORIES.

### To create qualification types:

1. Enter the name of the qualification.
2. In the Category field, select the type of qualification.
3. If required, rank the qualification.



## Entering Qualifications Framework Details

**Note:** This section applies only if you are defining a Qualifications Framework qualification.

4. Enter the Qualifications Framework identifier for the qualification.
5. Select the Qualifications Framework qualification type (for example, Diploma, Bachelor of Arts, or School Certificate).
6. Select the main and subsidiary fields of learning to which the qualification belongs.  
  
The main field of learning identifies the industry or sector to which the qualification belongs (for example, Management Studies or Nursing).  
  
The subsidiary field identifies the subject area within the field of learning to which the qualification belongs (for example, Marketing or Neonatal Care).
7. Select the level type and level.  
  
Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a qualification could be at Level 3 on a scale ranging from Level 1 through Level 5.  
  
The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).
8. Select the credit type and enter the total number of credits for this qualification.  
  
The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a Qualifications Framework qualification.
9. Select the qualification provider.
10. Select the Quality Assurance (QA) organization that registered the qualification provider.

## Entering Qualification Competencies

**Note:** This section applies only if you are defining a Qualifications Framework qualification.

11. Choose the Competencies button to display the Qualification Competencies window.
12. In the Unit Standard Competency Links region, select the name of a unit standard competency that contributes to this qualification.  
  
The Unit Standard identifier appears automatically.
13. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
14. Enter the dates between which the link is valid. You must enter a start date, but you can leave the end date blank.
15. Repeat Steps 12 through 14 for additional unit standard competencies.
16. Save your work.

## Entering Qualifications

You can enter qualifications for your workers when they first join the enterprise, and then update them after periodic assessments or appraisals or after completion of a training course.

**Note:** If the person for whom you are entering qualifications has person records that are linked together in more than one business group, then you will be able to see, but not update, any qualifications entered for them in other business groups.

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

### To enter qualifications:

1. Select the type of qualification this person possesses and the title of the qualification.  
If you need to set up additional qualification types see: Creating Qualification Types, page 5-66
2. Select the status of the qualification, for example, whether training is ongoing or completed.
3. Enter the grade at which the person holds the qualification, if appropriate.
4. Select the establishment at which the person gained the qualification.  
If you need to set up additional establishments see: Creating Schools and Colleges, page 5-70
5. Enter the name of the body that awards the qualification. If you record this value in the qualification types record for a Qualifications Framework qualification, it appears here automatically.
6. Enter the dates between which the qualification is gained. You must enter a Start date but you can leave the End date blank (if the qualification is still incomplete).
7. Optionally, enter the date the qualification was awarded.
8. Enter the projected completion date the qualification is awarded, if relevant.
9. Enter the ranked position within the class, if relevant.
10. Optionally, enter any comments, for example, what percentage of the award was course work or examination.
11. Save your work.

### To enter tuition fees for reimbursement:

1. Choose the Tuition tab.
2. Enter the fee amount and select the currency.
3. Select the method of tuition, for example, day release.
4. Enter the method of reimbursement, for example, bank transfer to be paid when qualification is awarded.

### To enter training details:

1. Choose the Training tab.

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

**To enter license details:**

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

**To enter professional membership details:**

1. Choose the Professional Membership tab.
2. Select the professional body to which the person belongs. The list of available organizations is limited to those given the classification of Professional Body.
3. Enter the membership number and select the membership category for the person.  
The membership categories available depend on the user defined table that has been selected to be used to calculate subscription rates for the professional body. This is used to calculate the amount that should be deducted during the payroll run.
4. Select the method by which the subscription is to be paid. This is optional and for information only.

**To view Qualifications Framework details:**

**Note:** This section applies to Qualifications Framework qualifications only.

1. Choose the Qualifications Framework Details tab.
2. Details of the selected qualification appear. For example, you can see its ID, the field of learning to which it belongs, and the number of credits earned. You cannot update this information.

**To enter subject details:**

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

## Creating Schools and Colleges

Use the Schools and Colleges window to enter the establishments that deliver the qualifications recognized by your enterprise.

### To create establishments:

1. Enter the name of the establishment.
2. Enter the name of the location.
3. Continue to enter establishments, then save your changes.

## Entering Schools and Colleges Attended

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

**Note:** If the person for whom you are entering establishments attended has person records that are linked together in more than one business group, then you will be able to see, but not update, any establishments entered for them in other business groups.

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

### To enter schools and colleges attended:

1. Do one of the following:
  - Select the name of the school or college attended from the list of values provided.
  - If the school or college attended does not exist in the list of values, enter the information in the name field.

**Note:** If you enter an additional school or college, it will only be available for this person. If you want to create a school or college for other people to access you can use the Schools and Colleges window. See: Creating Schools and Colleges, page 5-70

2. Enter the dates of the attendance and indicate whether it was full time. If the attendance is still ongoing leave the End Date field blank.
3. Continue to enter schools or colleges, if required, then save your changes.

# Appraisals

## Appraisals Overview

The appraisal process is a key component of the talent management function. During a typical appraisal, you assess a worker's competencies and objectives and identify development opportunities for the next appraisal period. The appraisal provides a snapshot of the worker's achievements and supplies input to related processes, such as training and compensation planning.

Most enterprises conduct appraisals at regular intervals (for example, yearly), primarily to assess competencies and objectives and influence compensation plans. However, you can also use appraisals for other purposes. For example, you can:

- Take a snapshot of worker competencies at the start or end of a project.
- Evaluate worker competencies after an event, such as a retraining exercise, to test its effectiveness.
- Assess worker progress against objectives at intervals during the appraisal period.
- Gather exit information when a worker leaves the enterprise.
- Assess specific competencies for a position or project.

The Oracle HRMS appraisals function can support all such requirements.

## A Collaborative Approach to the Appraisal

In a traditional appraisal, the appraisee's ability to contribute to the appraisal is limited. The manager or appraiser completes most of the appraisal and may invite the appraisee to comment at the end of the process.

HRMS challenges the traditional approach by making the appraisal the product of collaboration between the main appraiser and the appraisee. The main appraiser *shares* the appraisal with the appraisee to allow the appraisee to view or update the appraisal. If the main appraiser also transfers ownership of the appraisal to the appraisee (which is optional unless the appraisee is to update the appraisal) the appraisee *shares* the appraisal with the main appraiser to return ownership. This sharing of the appraisal between main appraiser and appraisee can occur as often as necessary during a single appraisal process.

See: The Appraisal Process, page 5-74

## Appraisal Participants

Appraisals can involve the following types of participants:

- The main appraiser, usually the appraisee's manager, who controls the appraisal process.
- Appraisers, who can contribute to all sections of the appraisal.
- Reviewers, who can view others' evaluations and enter overall comments. They cannot update other sections of the appraisal.
- Other participants, who contribute to 360-degree appraisals only. They complete questionnaires about the appraisee's performance, for example, and can enter overall comments, but can neither view nor update the rest of an appraisal. Other

participants are typically peers or subordinates of the appraisee to whom you do not want to reveal the appraisal contents.

- The appraisee, the subject of the appraisal, who can view or update those sections of the appraisal shared with them by the main appraiser. An appraisee who is the appraisal initiator can complete any section before sharing the appraisal with the main appraiser. Thereafter, the main appraiser controls the appraisee's access to the appraisal.

Employees and contingent workers can perform all appraisal roles.

## Appraisal Types

Oracle HRMS supports three appraisal types:

- Standard appraisal
- 360-degree appraisal
- Self appraisal

### Standard Appraisal

As its name suggests, the standard appraisal supports most appraisal requirements. The format of the appraisal depends on configuration choices you make, mostly in the *appraisal template*.

See: The Appraisal Template, page 5-87

The standard appraisal can include the following sections:

- **Competencies**

In the Competencies section, you evaluate the appraisee's proficiency in measurable skills. To include competencies in an appraisal, you must identify a *competency assessment template* in the appraisal template. Otherwise, no Competencies section appears in the appraisal.

See: Assessment Templates, page 5-89 and Assessing Competencies and Objectives, page 5-91

- **Competency Gaps**

In the Competency Gaps section, you can view the difference between an appraisee's current competency levels and those required by their job or position. This section appears in the appraisal only if you explicitly include it by personalizing the relevant SSHR pages; it does not appear by default.

- **Objectives**

In the Objectives section, you assess objectives allocated to the appraisee for the current appraisal period. To include objectives in an appraisal, you must identify an *objective assessment template* in the appraisal template. Otherwise, no Objectives section appears in the appraisal.

See: Assessment Templates, page 5-89 and Assessing Competencies and Objectives, page 5-91

**Note:** If you use appraisal templates created using the forms-based interface, the Objectives section appears in the appraisal by default.

- **Learning Path**

In the Learning Path section, you can identify training courses for the appraisee and specify target dates. You can use this section only if you also use Oracle Learning Management (OLM), and it appears in the appraisal only if you explicitly include it by selecting Include Learning Path in the appraisal template; it does not appear by default.

See: The Appraisal Template, page 5-87

- **Participants**

In the Participants section, you identify appraisers and reviewers to participate in this appraisal. For a standard appraisal, you cannot identify other participants. This section appears in the appraisal by default.

- **Questionnaires**

You can include appraisee and main appraiser questionnaires in the appraisal. Appraisers can complete the questionnaire you identify for the appraisee. Alternatively, you can select a different questionnaire when you include each appraiser in the appraisal. This section appears in the appraisal only if you select Include Questionnaires in the appraisal template.

See: The Appraisal Template, page 5-87

**Note:** If you use appraisal templates created using the forms-based interface, the main appraiser does not have a different questionnaire from the appraisee.

## **360-Degree Appraisal**

The 360-degree appraisal, also known as a *group appraisal*, is one to which an appraisee's peers, managers, and reporting staff can all contribute. It differs from the standard appraisal in one respect only: other participants can contribute to a 360-degree appraisal, but not to a standard appraisal. Appraisers and other participants can complete the appraisee questionnaire. Alternatively, you can select a different questionnaire when you include each appraiser and other participant in the appraisal.

The 360-degree appraisal can include the same sections as the standard appraisal.

## **Self Appraisal**

Some enterprises encourage their workers to perform regular self appraisals as a way of monitoring their own progress. No one else can view or contribute to a self appraisal. The self appraisal can include the same sections as the standard appraisal, except the Participants section.

## **Updating the Competency Profile**

A competency profile is a record of a worker's competencies showing their proficiency level in each competency. You create the competency profile using the forms-based interface, and you can maintain the competency profile using either the forms-based interface or the SSHR Competency Profile function. Alternatively, if you set the profile option Apply Assessment Competencies to Person to Yes, the application automatically updates the appraisee's competency profile to include revised competency levels when the appraisal is complete.

## Reporting and Analysis

Discoverer workbooks enable you to analyze appraisal activity for an organization hierarchy or supervisor hierarchy:

- Worksheets in the Appraisal Detail workbook provide information about multiple ongoing and completed appraisals, including appraisee name, appraisal duration, and final ratings.

See: Appraisal Detail Workbook, page 5-110

- Worksheets in the Competence Updates after Appraisal workbook enable you to view competency updates made manually or automatically when an appraisal is complete.

See: Competency Updates after Appraisal Workbook, page 5-111

## The Appraisal Process

This topic describes the standard and 360-degree appraisal process. For:

- A general introduction to appraisals in Oracle HRMS, see Appraisals, page 5-71
- A description of the appraisal setup tasks, see Setting Up the Appraisal Process, page 5-84
- A description of a typical appraisal process, see An Example Appraisal Process, page 5-77

To participate in an appraisal and view completed appraisals, you use Oracle SSHR.

## Initiating the Appraisal

If you use the HRMS Workforce Performance Management function, you can define a Performance Management Plan to create appraisals automatically on a specified date for all members of the plan. Appraisals created in this way identify either the main appraiser or the appraisee as the initiator of the appraisal. HRMS allocates the appraisal automatically to the specified initiator.

See: Performance Management Plans, page 5-36

Alternatively, either the main appraiser (usually a manager) or the appraisee can initiate a standard or 360-degree appraisal using the self-service Appraisals function.

Whether HRMS creates appraisals automatically or individuals create them using the Appraisals function, control of the appraisal depends on who is the initiator:

- A main appraiser who is the appraisal initiator controls its progress from the start. That is, the main appraiser decides when to share the appraisal with the appraisee, which information to share with the appraisee, whether to transfer appraisal ownership to the appraisee, and whether the appraisee can update the appraisal and provide feedback.
- An appraisee who is the appraisal initiator controls its progress until first sharing the appraisal with the main appraiser. The appraisee shares the whole appraisal with the main appraiser and cannot conceal particular sections. Thereafter, the main appraiser controls the progress of the appraisal, exactly as if the main appraiser were the initiator.

Managers log in as employees to initiate appraisals of themselves (self appraisals).



## Ownership of the Appraisal

Either the main appraiser or the appraisee owns the appraisal. The main appraiser transfers ownership by *sharing* the appraisal with the appraisee and leaving Main Appraiser Retains Ownership deselected. The appraisee transfers ownership by *sharing* the appraisal with the main appraiser.

When the main appraiser owns the appraisal, the appraisee:

- Cannot update the appraisal
- Can view the appraisal *up to the last sharing point*

Any changes the main appraiser makes to an in-progress appraisal after resuming ownership are not visible to the appraisee until the main appraiser shares the appraisal again.

When the appraisee owns the appraisal, the main appraiser:

- Cannot update the appraisal
- Can see all sections of the appraisal, and can view any changes the appraisee has made since resuming ownership

Ownership can transfer between the main appraiser and the appraisee as often as necessary during a single appraisal.

## Sharing Appraisals Without Transferring Ownership

If the main appraiser deselects Update Appraisal when sharing an appraisal with the appraisee, the appraisee cannot update the appraisal; however, by default, ownership of the appraisal still transfers to the appraisee. The appraisee must share the appraisal with the main appraiser to return ownership.

To enable the appraisee to view the appraisal but not gain ownership of it, the main appraiser selects Main Appraiser Retains Ownership. In this case, the main appraiser can continue to update the appraisal, and the appraisee does not need to share the appraisal in return.

Main Appraiser Retains Ownership appears only for appraisals whose status is Ongoing.

## How Appraisers, Reviewers, and Other Participants Contribute to the Appraisal

Participants in an appraisal (appraisers, reviewers, and other participants) do not own the appraisal. While the main appraiser owns the appraisal, all participants can update the appraisal. However, while the appraisee owns the appraisal, only other participants can update it; appraisers and reviewers cannot update the appraisal. Appraisers and reviewers automatically regain their access to the appraisal when the appraisee shares it with the main appraiser again.

When the main appraiser requests feedback, participants receive workflow notifications. Each participant makes their contribution to the appraisal independently of the other participants. Participants can see changes made to the sections to which they have access, including those made after the main appraiser requests their feedback, until they apply their contribution. At that point, their view of the appraisal is frozen. They can make further updates only if the main appraiser requests feedback again.

**Note:** When participants complete their contribution to the appraisal, their participation status (as shown in each participant's

notification table) is Complete. However, the appraisal remains in their notification tables until the appraisal itself is complete.

## Deleting Participants and Changing Participant Roles

You can delete a participant from an appraisal or change their role (for example, you can change an appraiser to a reviewer), provided the participant has not yet given feedback.

## Changing the Main Appraiser

When the main appraiser is the initiator of an appraisal, that person's name appears by default in the Main Appraiser field on the Setup Details page of the appraisal. When the appraisee is the initiator of an appraisal, the name of that person's manager appears by default in the Main Appraiser field. In either case, the appraisal initiator can select a different main appraiser on the Setup Details page.

As main appraiser, you can select a different main appraiser (by clicking Change Main Appraiser) once the appraisal is in progress. If you do this after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal and can neither view nor update it unless the new main appraiser explicitly requests your feedback. If you change main appraiser after completing a section of the appraisal (for example, the competency ratings), you remain listed as a participant and your contribution is retained. However, your view of the appraisal as a participant is frozen, and you can make no further changes unless the new main appraiser explicitly requests further feedback.

**Note:** If your security profile gives you access to the appraisee, you can view the appraisal regardless of your past or current involvement in the appraisal.

## The Printable Page Function

From the Appraisal Review page, you can click Printable Page to display the complete appraisal, with all sections expanded, in a separate window. You use standard browser functionality to print or save a copy of the appraisal. Alternatively, you can keep this window open for reference while you continue to work on the appraisal.

**Note:** The view of the appraisal that appears in the Printable Page window depends on your role in the appraisal. For example, the main appraiser sees the complete appraisal, whereas the appraisee's version is likely to exclude some sections.

## Appraisal Approval

You can implement your enterprise's approval process for appraisals using the standard SSHR approvals functionality.

When main appraisers give final ratings, they can add approvers and specify their position in the approvals chain. Each approver receives a workflow notification requesting their approval when the previous approver in the chain has approved. When the final approver has approved the appraisal, the main appraiser receives a workflow notification.

Any approver who disagrees with the appraisal can return it to the main appraiser for correction. The main appraiser can then update the appraisal and resubmit it to all approvers.

**Note:** If an approver rejects the appraisal rather than returning it for correction, its status is set to Deleted. You cannot update a deleted appraisal.

When you send the appraisal to approvers, you can also request the appraisee's feedback on the overall rating. In this case, the appraisee receives a request for feedback when all approvers have approved the appraisal. At the same time, the main appraiser receives a notification that the appraisee's feedback has been requested. When the appraisee provides feedback, the main appraiser receives a further notification, and the appraisal process is complete.

## Accessing Completed Appraisals

The Appraisals home page lists completed appraisals in which you have participated. For example, for an employee, the My Appraisals tab lists completed appraisals of that employee. For a manager, the Main Appraiser tab lists completed appraisals for which the manager has been main appraiser. You can specify filter values, such as appraisal purpose and appraisee, to locate particular completed appraisals in the list.

**Note:** When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

Note that your role determines your view of a completed appraisal. For example, appraisees see only information they have entered and any section shared with them by the main appraiser.

Using the View Appraisals in People Hierarchy function on the Appraisals home page, a main appraiser can also view in-progress and completed appraisals of any appraisee to whom their security profile gives them access. For example, as a manager you can view appraisals of workers who report to you, even if you have not participated in their appraisals in any role.

## Self Appraisal

To perform a self appraisal, you log into self-service as an employee (even if you are a manager). A self appraisal involves only the employee, and there is no approval process.

**Note:** When you submit a self appraisal, its status is Completed. If you want to update a self appraisal at intervals (for example, throughout the year), use the Save as Draft function to keep the appraisal in progress rather than submitting the appraisal.

## An Example Appraisal Process

This example process describes a standard appraisal created automatically by HRMS from a Performance Management Plan (PMP). The main appraiser is identified as the appraisal initiator. The flow described here is typical; however, the HRMS appraisals functionality is flexible enough to accommodate different process flows from the one described here.

## Initiating the Appraisal

HRMS created the appraisal automatically on the date specified in the PMP and allocated it to you as main appraiser. You:

1. Log in to Manager Self Service and select the Talent Management function.  
Your Talent Management Task List includes the task Manage Appraisals, which is enabled during the appraisal-task period.
2. You select the Manage Appraisals task, and then select the Appraise action for the first appraisee.

The appraisal template used in this example includes all available sections.

## Performing a Standard Appraisal

1. In the Appraisals Overview page, you complete the following regions:
  - The Competencies region, which already includes job competencies as specified in the competency assessment template. You add other competencies for this employee, and enter your evaluation of all competencies.
  - The Objectives region, which includes objectives to be appraised from the employee's personal scorecard. You enter a performance rating for each objective.
  - The Learning Path region, where you enter courses the appraisee should attend and specify target completion dates.
  - The Questionnaire region, where you complete the questionnaire identified for the main appraiser in the appraisal template.

You decide not to complete the Participants and Overall Rating and Comments regions at this point.

2. You share the appraisal with the appraisee. You decide to share:
  - Your competency ratings and comments
  - Your objective ratings and comments

You decide not to share your completed questionnaire. In addition, you do not select Overall Rating and Overall Comments because you have not yet completed these entries. The appraisee can see the Learner Path region by default.

To allow the appraisee to update the appraisal, you select Update Appraisal in the Appraisee Permissions region. You do not select Participant Details. Provide Feedback on Overall Rating is not selectable because you have not selected Overall Rating.

While the appraisee owns the appraisal, you can view the appraisal but not update it.

3. The appraisee adds their own competency and objective ratings, completes the appraisee questionnaire, and then shares the appraisal with you.
4. You review the appraisee's contributions, amend one of your own competency evaluations, and include an additional objective in the Objectives region. You also add participants to the appraisal.
5. You share the appraisal with the appraisee again. On this occasion, you select:
  - Competency Ratings and Comments, so the appraisee can view your amendment
  - Participant Details, so the appraisee can review and update the list of participants

- Update Appraisal, so the appraisee can update the appraisal (specifically, the list of participants)

**Note:** If you deselect Update Appraisal, the appraisee can view the information you are sharing but cannot update it. However, the appraisee can still provide feedback if you select Provide Feedback on Overall Rating.

You leave Main Appraiser Retains Ownership deselected because, to update the appraisal, the appraisee must own it.

**Note:** If you select Main Appraiser Retains Ownership, the appraisee can view any information you share but can neither update the appraisal nor provide feedback on the overall rating.

As you did not select Objective Ratings and Comments, the appraisee can see the list of objectives, including the objective you added in Step 4, but cannot see any of your objective ratings and comments.

While the appraisee owns the appraisal, you can view the appraisal but not update it.

6. The appraisee updates the list of participants and shares the appraisal with you again.
7. You review the revised list of participants. You remove one of the appraisers and make another a reviewer rather than an appraiser.
8. You share the appraisal with the appraisee, but this time you select Main Appraiser Retains Ownership so that you can continue to work on the appraisal. The appraisee can view latest changes but cannot make further updates.
9. You request the participants' feedback.
10. As you receive notification that participants have contributed to the appraisal, you review their contributions and make any further changes to the appraisal.
11. When all participants have contributed and you have no further changes to make, you are ready to discuss the appraisal with the appraisee. You use the Employee Review function to schedule a review meeting.

See: Entering an Employee Review, page 5-106

You use the appraisals Printable Page function to print the appraisal to take to the meeting.

12. After the review meeting, you give final ratings and request approval. In the Details to be Shared with Appraisee region of the Final Ratings page, you select:
  - Additional Details, so that the appraisee can see latest changes to those sections of the appraisal to which the appraisee already has access
  - Overall Comments
  - Overall Rating
  - Provide Feedback on Overall Rating, so that the appraisee can comment

You decide not to share participant names and ratings.

13. Each approver in the approvals chain receives notification when their approval is required. One approver returns the appraisal for correction.

14. You update the appraisal to address their concerns and send the appraisal to all approvers and recipients again.

This time, all approvers approve the appraisal.

15. The appraisee receives a request for feedback on their overall rating. The appraisee reviews the sections of the appraisal you have allowed them to see, including the overall rating and comments, and provides feedback.

The appraisal process is now complete.

For a summary of the appraisals workflow notification messages, see: Appraisals Workflow Notifications, page 5-80

## **Appraisals Workflow Notifications**

This topic provides a summary of workflow notifications, organized by appraisal role, specific to standard or 360-degree appraisals. For notifications you generate, it identifies the action that generates the notification, who receives it, and how it affects your access to the appraisal. For notifications you receive, it identifies the message subject and any actions you need to take.

## Main Appraiser

### Notifications the Main Appraiser Generates

Action	Notification Sent To	Effect on Appraisal Access
Share With Appraisee and Transfer Appraisal Ownership	Appraisee	You continue to view all parts of the appraisal, but cannot update it until the appraisee shares the appraisal with you again.
Share With Appraisee and Retain Appraisal Ownership	Appraisee	You can continue to update all sections of the appraisal.
Change Main Appraiser	New Main Appraiser	If you change main appraiser after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal and can neither view nor update it. If you change main appraiser after completing some sections of the appraisal, you remain listed as an appraiser, and any information you enter is retained. However, you can make no further changes to the appraisal. In either case, you can view the appraisal if your security profile gives you access to the appraisee.
Request Feedback	Participants (Appraisers, Reviewers, Other Participants)	Your access to the appraisal is unaffected.
Add Approvers and Recipients	Approvers and Recipients	You can view but not update the appraisal.

### Notifications the Main Appraiser Receives

Notification Message	Action
The appraisal of <i>appraisee</i> needs your attention as main appraiser.	Review and update the appraisal.
You have been selected as main appraiser for the appraisal of <i>appraisee</i> .	Continue the appraisal.
<i>Participant</i> has completed their appraisal of <i>appraisee</i> .	Review the participant's contribution.
Appraisal for <i>appraisee</i> has been approved.	No action required.
Appraisal for <i>appraisee</i> has been approved and is pending appraisee feedback.	No action required.
Appraisee <i>appraisee</i> has provided feedback on appraisal.	Review the appraisee feedback.

## Appraisee

**Note:** The main appraiser determines the appraisee's view of an appraisal. For example, if the main appraiser shares competency comments and ratings with the appraisee, the appraisee can view those items. Otherwise, they are not visible to the appraisee.

### *Notifications the Appraisee Generates*

Action	Notification Sent To	Effect on Appraisal Access
Share with Main Appraiser	Main Appraiser	You can access your view of the appraisal up to latest the sharing point. You cannot update the appraisal again until the main appraiser shares the appraisal with you and allows you to update it.

### *Notifications the Appraisee Receives*

Notification Message	Action
Your appraisal has been transferred to you.	Review the appraisal, make any permitted updates, and share the appraisal with the main appraiser.
View latest details of your appraisal.	Review the appraisal. You cannot update the appraisal and do not need to share the appraisal with the main appraiser.
Your appraisal has been completed.	No action required.
Your appraisal has been completed. Please review and provide feedback	Click Details on the Appraisals tab, review the appraisal, then click Share with Main Appraiser. Enter your comments in the Feedback field.

## Appraiser

### *Notifications the Appraiser Generates*

Action	Notification Sent To	Effect on Appraisal Access
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see anything you could see before you entered your contribution and clicked Complete, but nothing entered after that point. You can make no further updates unless the main appraiser notifies you again.



***Notifications the Appraiser Receives***

Notification Message	Action
The appraisal of <i>appraisee</i> needs your attention as appraiser.	Update the appraisal to provide your input. Note that you can update the appraisal only while the main appraiser owns it. While the appraisee owns the appraisal, only other participants can update it.

**Reviewer*****Notifications the Reviewer Generates***

Action	Notification Sent To	Effect on Appraisal Access
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see anything you could see before you entered your contribution and clicked Complete, but nothing entered after that point. You can make no further updates unless the main appraiser notifies you again.

***Notifications the Reviewer Receives***

Notification Message	Action
The appraisal of <i>appraisee</i> needs your attention as reviewer.	Review the appraisal and enter your comments. Note that you can update the appraisal only while the main appraiser owns it. While the appraisee owns the appraisal, only other participants can update it.

**Other Participant**

Other participants are involved in 360-degree appraisals only.

***Notifications the Other Participant Generates***

Action	Notification Sent To	Effect on Appraisal Access
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see the questionnaire you completed and the comments you entered, but can make no further updates unless the main appraiser notifies you again.

### ***Notifications the Other Participant Receives***

<b>Notification Message</b>	<b>Action</b>
The appraisal of <i>appraisee</i> needs your attention as other participant.	Complete the questionnaire and provide overall comments.

## **Setting Up the Appraisal Process**

This topic brings together several tasks that affect the appraisal process. You may already have performed some of these tasks during implementation of HRMS and SSHR.

### **To set up the appraisal process:**

1. During an appraisal, HRMS can allocate a rating to each objective and competency based on standard calculations. Alternatively, you can define your own formulas to calculate objective and competency ratings.  
  
See: Assessing Competencies and Objectives, page 5-91
2. To include competencies in an appraisal, create one or more competency assessment templates. HR Professionals and other authorized users create competency assessment templates using the Manage Competency Assessment Templates function.  
  
See: Assessment Templates, page 5-89
3. To include objectives in an appraisal, create one or more objective assessment templates. HR Professionals and other authorized users can create objective assessment templates using the Manage Objective Assessment Templates function.  
  
See: Assessment Templates, page 5-89
4. For rating overall performance, identify an existing performance rating scale or create a new performance rating scale. You select this rating scale when you define the appraisal template.  
  
See: Creating a Rating Scale, page 5-15  
  
Alternatively, you can write a formula to calculate a final rating based on a worker's final scores for competencies and objectives. (In this case, you select both a rating scale and a formula when you define the appraisal template.)  
  
See: Assessing Competencies and Objectives, page 5-91
5. Identify or create questionnaires to include in the appraisal. If you omit this step, you cannot select questionnaires for the appraisee and main appraiser when you define the appraisal template. For 360-degree appraisals, you must define a questionnaire.  
  
See: The Appraisal Template, page 5-87
6. Create an appraisal template to configure the appraisal. You must create at least one appraisal template, and you can create several if you want to use a different template for each appraisal type or purpose.  
  
To create the appraisal template, HR Professionals and other authorized users use the Manage Appraisal Templates function.  
  
See: The Appraisal Template, page 5-87
7. Review current settings of these profile options, and update if necessary:

---

Apply Assessment Competencies to Person	Controls whether HRMS updates an appraisee's competency profile automatically when an appraisal is complete. By default, this option is set to No.
HR: Appraisee Can Add Participants	Controls whether appraisees can add appraisers, reviewers, and other participants to their appraisal. By default, this option is set to Yes.
HR: Manager Appraisals Menu	Controls the types of appraisal a manager can create. By default, this option is set to Manager Appraisals Menu.
HR: Save and Stay in Appraisals Page	Controls page display when you click Save as Draft. By default, the current page remains displayed, and you can continue to edit the appraisal. If you set this option to No, the Appraisals home page replaces the current page.
HR: Worker Appraisals Menu	Controls the types of appraisal a worker can create. By default, this option is set to Employee Appraisals Menu.
Talent Management Source Type	Enables you to select a default value from the PROFICIENCY_SOURCE (Source of Proficiency Rating) user lookup. HRMS uses this value when updating a person's competency profile automatically.

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

8. Edit the APPRAISAL\_TYPE lookup to include your enterprise's appraisal types. The values you specify here populate the Appraisal Purpose list on the SSHR Appraisal Setup page.

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

9. If appropriate, edit the APPRAISAL\_ASSESSMENT\_STATUS lookup to update the appraisal status values.

See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

10. When you create a new appraisal using the self-service Appraisals function, you select an appraisal template in the Appraisal Setup Details page. You can personalize the Appraisal Setup Details page for each type of appraisal to identify a default appraisal template.

See: Appraisals (Self-Service), *Oracle HRMS Deploy Self-Service Capability Guide*

11. A manager can view all appraisals for an individual in a people hierarchy. By default, the people hierarchy excludes ex-employees. To include appraisals of ex-employees, you edit the relevant function.

See: Appraisals (Self-Service), *Oracle HRMS Deploy Self-Service Capability Guide*

12. Configure components of the SSHR Appraisals pages, such as flexfields, instruction text, and messages. In addition, you can include or exclude specific regions of the pages.

See: Appraisals (Self-Service), *Oracle HRMS Deploy Self-Service Capability Guide*

**Note:** You can use function-level personalization to personalize the entire appraisal process under a single function.

See: The Personalization Framework, *Oracle HRMS Deploy Self-Service Capability Guide*

13. Define your approvals process for appraisals, and use the Oracle Workflow Builder to configure the process.

See: Approvals Overview, *Oracle HRMS Deploy Self-Service Capability Guide*

You are now ready to perform an appraisal.

See: The Appraisal Process, page 5-74

# Appraisal and Assessment Templates

## The Appraisal Template

The appraisal template is the design document for an appraisal. Its main function is to configure all sections of the appraisal to suit the appraisal purpose or enterprise requirements: you can use a single appraisal template throughout the enterprise.

## Configuring the Appraisal

When you create an appraisal template, you can:

- Specify validity dates. Outside these dates, the template is not available for use. You can use these dates to associate the template with a performance-management period, for example.
- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them.

If the appraisal template has global scope, any assessment templates, questionnaires, and rating scales that you include in the template must also have global scope. If the appraisal template has local scope, any assessment templates and questionnaires that you include in the template must be local to the same business group as the appraisal template. Rating scales, however, can be either global or local.

- Include instructions to appraisal participants. These instructions appear, formatted as you specify, on the Appraisal Overview page.

## Assessing Competencies and Objectives

To assess competencies during an appraisal, you must select or create a competency assessment template in the appraisal template. Otherwise, the Competencies region does not appear in appraisals.

To assess objectives during an appraisal, you must select or create an objective assessment template in the appraisal template. Otherwise, the Objectives region does not appear in appraisals.

See: Assessment Templates, page 5-89

To allocate a final rating to the appraisee, you select a performance-rating scale. In addition, you can select an Appraisal Total Score Formula to identify the appropriate final rating from the selected performance-rating scale. The formula, which you write, can base any calculations on the worker's total scores for competencies and objectives. The rating identified by the formula appears as the worker's Suggested Overall Rating on the Final Ratings page of the appraisal. HRMS supplies some example formulas for calculating the appraisal total score.

See: Assessing Competencies and Objectives, page 5-91

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

## Including the Learning Path Region

In the Learning Path region of an appraisal, you can identify training courses for the appraisee. You select the Include Learning Path option to include the region in appraisals.

## Setting the Appraisal Sharing Options

When main appraisers share appraisals with appraisees, they specify which information the appraisee can view and whether the appraisee can update the appraisal. For example, to share competency ratings and comments, the main appraiser selects the Competency Ratings and Comments check box. By default, no sharing option is selected, but you can change this initial setting for appraisals that use this template. The main appraiser can override these initial appraisal-sharing options in appraisals that use the template.

## Including Questionnaires

You can attach appraisee and main appraiser questionnaires to the appraisal template.

The appraisee questionnaire is available to the appraisee, appraisers, and other participants. When you add appraisers and other participants to an appraisal, you can select either Default Questionnaire (which is the appraisee questionnaire) or a different questionnaire.

The main appraiser has no default questionnaire. If you want the main appraiser to complete a questionnaire, you must select it explicitly. You can select the same questionnaire for both the main appraiser and the appraisee.

To create a questionnaire, you use the Questionnaire Administration function.

## Questionnaire Scope

To include the same questionnaire in all appraisals in enterprises that use multiple business groups, define the questionnaire with global scope. Otherwise, questionnaires are available only in the business group in which you create them.

## Publication Status of Questionnaires

Any questionnaire that you attach to an appraisal template must have the status Published. You can publish a questionnaire either when you create it or at a later date (after review of the questionnaire, for example).

You can change the status of a questionnaire from Published to Unpublished at any time, even if the questionnaire is currently in use in appraisals or simply attached to an appraisal template. This feature enables you to prevent future use of a questionnaire. For example, if you create a different questionnaire for each year's appraisals, you can prevent next year's appraisals from using this year's questionnaire by setting its status to Unpublished.

## Creating an Appraisal Template

To create an appraisal template, you use the Manage Appraisal Templates function. You can access this function from the HR Professional menu, where it appears by default.

You can define as many appraisal templates as you need to meet enterprise requirements. For example, you could define a different template for each Performance Management Plan or different templates for each appraisal purpose (such as annual appraisal, exit appraisal, or benchmarking appraisal). Alternatively, you can use a single appraisal template for all appraisals.

**Note:** You can continue to use appraisal templates created in the Appraisal Template window of the forms-based interface. However, their scope is local only. To update or delete these templates, use the Manage Appraisal Templates function.

In the Search region of the Manage Appraisal Templates function, you can search for existing templates created using either this function or the Appraisal Template window. When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

## Assessment Templates

To assess competencies and objectives during an appraisal, you must include a competency assessment template and an objective assessment template in the appraisal template. You design competency assessment templates and objective assessment templates to meet enterprise requirements.

### Competency Assessment Templates

The competency assessment template specifies how to assess competencies in appraisals. When you create a competency assessment template, you can:

- Specify validity dates. Outside these dates, you cannot use the template. These dates must not conflict with the validity dates of the appraisal template in which the competency assessment template appears. For example, if the appraisal template has no valid-to date, the competency assessment template must have no valid-to date.
- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them. The scope must match the scope of any appraisal template in which the competency assessment template appears.
- Include instructions to participants. These instructions appear, formatted as you specify, in the Competencies region of the Appraisal Overview page.
- Identify competencies that you want to assess. For example, you can include competencies required by a worker's job in the appraisal. Selections that you make in the competency assessment template apply to all users of the template. However, during the appraisal you can tailor the Competencies region to suit the appraisee.

**Note:** You can delete job competencies from a worker's appraisal, but you cannot delete from an appraisal other competencies that appear in the competency assessment template.

### Selecting a Rating Scale Type for Competencies

To specify how HRMS will calculate scores for individual competencies, you select a rating scale type. HRMS can calculate scores based on performance, proficiency, or both. In addition, HRMS can apply a weighting value to either performance or proficiency.

Alternatively, you can select Fast-Formula-Based Line Scoring and enter a formula name. The selected formula calculates a score for each competency using specified performance, proficiency, and weighting values. HRMS supplies sample formulas for calculating competency scores; you can also define your own.

See: Assessing Competencies and Objectives, page 5-91

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

Whether you use a formula or one of the standard HRMS calculation methods, you specify whether the total competency score is the average or the sum of all competency ratings.

The score for each competency (the line score) and the total competency score appear in the Final Ratings page of the appraisal.

## Creating Competency Assessment Templates

To create a competency assessment template, you use the Manage Competency Templates function. You can access this function from:

- The HR Professional menu, where it appears by default
- The Manage Appraisal Templates function, when you click Create Competency Template

In this case, the competency assessment template has the same name and validity dates as the appraisal template.

You define as many competency assessment templates as you need to meet enterprise requirements. For example, you could tailor competency assessment templates to jobs, positions, or even individuals. Alternatively, you could define an assessment template for your enterprise's core competencies, and the main appraiser or appraisee can include additional competencies, such as those appropriate to a job or an individual, during the appraisal. You can even define a competency assessment template that contains no competencies; in this case, the main appraiser or appraisee includes all relevant competencies during the appraisal.

**Note:** You can continue to use competency assessment templates created in the Assessment Template window of the forms-based interface. However, their scope is local only. To update or delete these templates, use the Manage Competency Templates function.

## Objective Assessment Templates

The objective assessment template specifies how to assess objectives in appraisals. When you create an objective assessment template, you can:

- Specify validity dates. Outside these dates, you cannot use the template. These dates must not conflict with the validity dates of the appraisal template in which the objective assessment template appears. For example, if the appraisal template has no valid-to date, the objective assessment template must have no valid-to date.
- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them. The scope must match the scope of any appraisal template in which the objective assessment template appears.
- Include instructions to participants. These instructions appear, formatted as you specify, in the Objectives section of the appraisal.

For appraisals created automatically, HRMS copies the worker's personal scorecard of objectives to the Objectives region of the appraisal. Otherwise, the main appraiser and appraisee populate the Objectives region during the appraisal.



## Selecting a Rating Scale Type for Objectives

To specify how HRMS will calculate scores for objectives, you select a rating scale type. You can select a performance scale, from which users select a rating for each objective. If the objective's definition includes a weighting value, HRMS multiplies performance by weighting to give a score for each objective. Otherwise the performance rating is the objective score.

Alternatively, you can select Fast-Formula-Based Line Scoring and enter the name of a formula to calculate a score for each objective. HRMS supplies sample formulas for calculating objective scores; you can also define your own.

See: Assessing Competencies and Objectives, page 5-91

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

Whether you use a formula or select a performance scale, you specify whether the total objectives score is the average or the sum of all objective ratings.

The score for each objective (the line score) and the total objective score appear in the Final Ratings page of the appraisal.

## Creating Objective Assessment Templates

To create an objective assessment template, you use the Manage Objective Templates function. You can access this function from:

- The HR Professional menu, where it appears by default
- The Manage Appraisal Templates function, when you click Create Objective Template

In this case, the objective assessment template has the same name and validity dates as the appraisal template.

You define as many objective assessment templates as you need to meet enterprise requirements. For example, if you use a different formula to calculate objective scores for each job or position, you define multiple objective assessment templates. You may also want to define a different objective assessment template for each performance-management period.

## Managing Existing Templates

In the Search region of the Manage Competency Templates and Manage Objective Templates pages, you can search for existing templates created using either these functions or the Assessment Template window. When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

## Assessing Competencies and Objectives

During an appraisal, each participant can allocate ratings to individual competencies and objectives to indicate a worker's level of achievement. The main appraiser can also allocate an overall rating to a worker's performance for the appraisal period.

## Assessing Competencies

When you define a competency, you specify how you will measure a worker's proficiency in that competency. You can:

- Specify proficiency levels that are unique to the competency.
- Select a general proficiency-rating scale.

See: Competency Measurement, page 5-11

The competency assessment template defines how you will assess a worker's competencies during an appraisal. You can assess:

- Proficiency only
- Performance only
- Both proficiency and performance

You can also apply a weighting value to either proficiency or performance. The competency assessment template identifies any performance and weighting scales you will use.

HRMS calculates a score for each competency (a competency line score) and a total score for all competencies. These scores appear in the Competency Ratings region of the Final Ratings page of the appraisal.

To calculate competency line scores, HRMS can use one of the following standard calculations:

Rating-Scale Type	Score Derived From:
Performance	Performance
Proficiency	Proficiency
Performance and Proficiency	Proficiency multiplied by Performance
Performance and Proficiency, Weighting for Performance	Performance multiplied by Weighting
Performance and Proficiency, Weighting for Proficiency	Proficiency multiplied by Weighting
Performance with Weighting	Performance multiplied by Weighting
Proficiency with Weighting	Proficiency multiplied by Weighting

For example, if you select the rating-scale type "Performance and Proficiency, Weighting for Performance," the application multiplies performance by weighting to produce the competency line score.

As an alternative to the standard calculations, you can select Fast-Formula-Based Line Scoring and identify a formula in the competency assessment template to calculate competency line scores.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: Assessment Templates, page 5-89

The total score for all competencies can be either the average or the sum of the competency line scores. For the following example, the total score can be either 18 (if you select Sum) or 6 (if you select Average).

Competency	Competency Line Score
Competency 1	4
Competency 2	4
Competency 3	10

## How HRMS Calculates Competency Line Scores

If you select the rating-scale type Fast-Formula-Based Line Scoring and select one of the supplied sample formulas (such as PERF\_X\_WEIGHTING), the calculation that the application performs to produce a competency line score differs from the calculation it performs when you select one of the standard rating-scale types (for example, Performance with Weighting). In some cases, this variation in the calculation may produce slightly different results for identical data.

To illustrate the differences that the calculation method can produce, consider the example competency Develop Leadership Skills. For this competency, the participants' ratings are as follows:

Participant	Proficiency	Performance	Weighting
1	4	3	3
2	4	4	3
3	3	2	2

### If You Select Fast-Formula-Based Line Scoring

If you select the rating-scale type Fast-Formula-Based Line Scoring and the formula PERF\_X\_WEIGHTING in the Competency Assessment Template, the application:

1. Calculates the average weighting for the competency by dividing the total of the weighting values (8, in this example) by the number of participants (3).
2. Calculates the average performance rating for the competency by dividing the total of the performance scores (9, in this example) by the number of participants (3).
3. Multiplies the average weighting by the average performance rating (for example,  $(8 / 3) * 3 = 8$ ). The result of this calculation (8, in this example) is the competency line score (the appraisee's rating) for the competency Develop Leadership Skills.

### If You Do Not Select Fast-Formula-Based Line Scoring

If you select a rating-scale type other than Fast-Formula-Based Line Scoring (for this example, Performance with Weighting) in the Competency Assessment Template, the application:

1. Multiplies performance by weighting to produce each participant's competency line score. For the example competency Develop Leadership Skills, the results are:
  - Participant 1 = 9

- Participant 2 = 12
  - Participant 3 = 4
2. Sums the participants' competency line scores to produce a total score for the competency (for example,  $9 + 12 + 4 = 25$ ).
  3. Divides the total score by the number of participants to produce the average score (for example,  $25 / 3 = 8.33$ ). The result of this calculation (8.33) is the competency line score (the appraisee's rating) for the competency Develop Leadership Skills.

As you can see from these examples, the results produced by each approach may not be identical, even though the assessment data is identical and the type of calculation (performance multiplied by weighting) is the same in both cases. Therefore, to ensure consistent results, you are recommended to use only one of these two approaches for any group of employees whose results you need to compare.

## Assessing Objectives

During an appraisal, HRMS calculates a score for each objective and a total score for all objectives. These scores appear in the Objective Ratings region of the Final Ratings page of the appraisal.

How HRMS produces the objective line score (the score for an individual objective) depends on the rating-scale type you select in the objective-assessment template. If you select Performance and identify a performance scale, the application calculates the average of all participants' performance ratings for the objective to produce the objective line score. If you select Fast-Formula-Based Line Scoring, how the application calculates the objective line score depends on the formula you select. Possible inputs to the formula are each participant's performance rating and any weighting value included in the objective's definition. HRMS supplies two sample formulas, and you can also provide your own.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: Assessment Templates, page 5-89

The total score for all objectives can be either the average or the sum of the individual scores. For the following example, the total score can be either 12 (if you select Sum) or 3 (if you select Average).

Objective	Objective Line Score
Objective 1	4
Objective 2	3
Objective 3	3
Objective 4	2

## Producing a Combined Score for Objectives and Competencies

In the appraisal template, you can select a formula for calculating a combined score for competencies and objectives. Inputs to the formula are the total scores for objectives and competencies. The output from the formula is a rating level ID that identifies a rating level in the final-rating scale named in the appraisal template. The application displays

the associated rating level as the appraisee's suggested overall rating in the Overall Rating and Comments region of the appraisal Final Ratings page.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: The Appraisal Template, page 5-87

## Viewing Appraisal Templates

**Note:** You cannot use the Appraisal Template window to create new appraisal templates or update existing appraisal templates. Instead, you use the Manage Appraisal Templates function.

See: The Appraisal Template, page 5-87

You can view appraisal templates in the Appraisal Template window, provided that you created them in this window. You cannot use this window to view templates created using the Manage Appraisal Templates function.

### To view an appraisal template:

1. From the View menu, select Query By Example, then select Enter.
2. Enter search values, such as the complete or partial name of an appraisal template.
3. From the View menu, select Query By Example, then select Run. Scroll through the results if the search returns multiple appraisal templates.

## Viewing Competency Assessment Templates

**Note:** You cannot use the Assessment Template window to create new assessment templates or update existing assessment templates. Instead, you use the Manage Competency Templates and Manage Objective Templates functions.

See: Assessment Templates, page 5-89

You can view competency assessment templates in the Assessment Template window, provided that you created them in this window. You cannot use this window to view templates created using the Manage Competency Templates or Manage Objective Templates function.

### To view an assessment template:

1. From the View menu, select Query By Example, then select Enter.
2. Enter search values, such as the complete or partial name of an assessment template.
3. From the View menu, select Query By Example, then select Run. Scroll through the results if the search returns multiple assessment templates. For any assessment template, the Performance Scale, Weighting Scale, and Competencies buttons are enabled only if the template includes such information. Otherwise, these buttons are disabled.

# Career and Succession Planning

## Career and Succession Planning

Having identified an employee's aspirations during their appraisal, you will want to prepare them for their next position within a career plan and keep them motivated by linking their own career aspirations to enterprise aspirations. By planning careers and succession, you enable employees to see their future role within the enterprise, keeping them motivated, and relieve you of lengthy and costly recruitment.

A succession plan can help you identify training and development needs for an employee. This means you can train a potential successor to have exactly the right skills on their succession to a position.

Career and succession planning also enables you to highlight scarce competencies within your enterprise. Once you have identified these competencies, you can develop them and replace current employees as required.

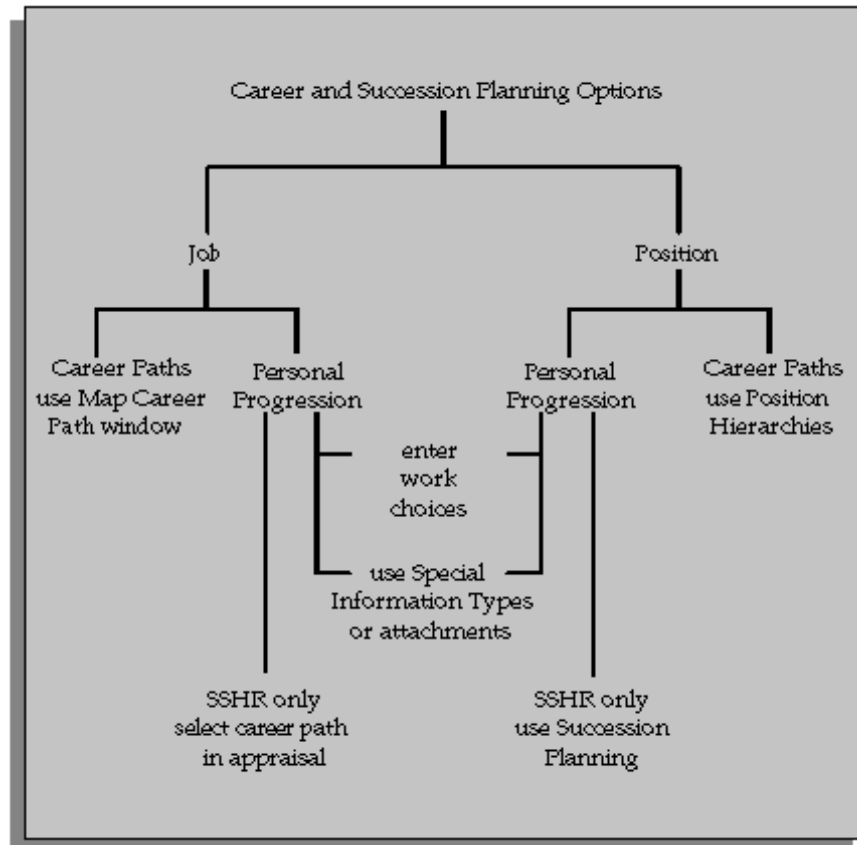
With suitability matching you can rank an employee's competencies. Search tools, in SSHR, enable you to rank by organization, job or position. You can also identify suitable work for a person.

See: Person Search, *Oracle iRecruitment Implementation Guide*

You can model careers and succession plans based on either jobs or positions.

The figure illustrates the different models you can select from.

### Career and Succession Planning Options



## Work Choices

Using work choices (also known as work preferences), you can track the capacity of an employee, applicant, contractor or ex-employee to be deployed within the enterprise.

You can record a person's work choices, such as their willingness to travel or relocate, their preferred working hours and work schedule, and the length of time they would like to stay in their next post. You can then compare these choices with the work requirements of jobs or positions when you are planning redeployment.

## Succession Planning and SSHR

If you are using the Line Manager responsibility in Oracle Self-Service Human Resources (SSHR), you can use additional features for holding succession plan information. You can:

- Identify many potential successors for a position. You do this by comparing the competencies of a group of people with the competence requirements of the position.
- Identify many different succession options for one person.

Once you have a short-list of successors to a position, you can perform a graphical suitability match to show training needs or to rank potential successors.

You will find the SSHR Suitability Matching tool useful when succession planning. The suitability matching function compares and ranks a person's competencies. Search tools enable you to find the best person for a job or position. You can also compare and rank

a person's ability in current organizations, jobs or positions and identify suitable work for a person.

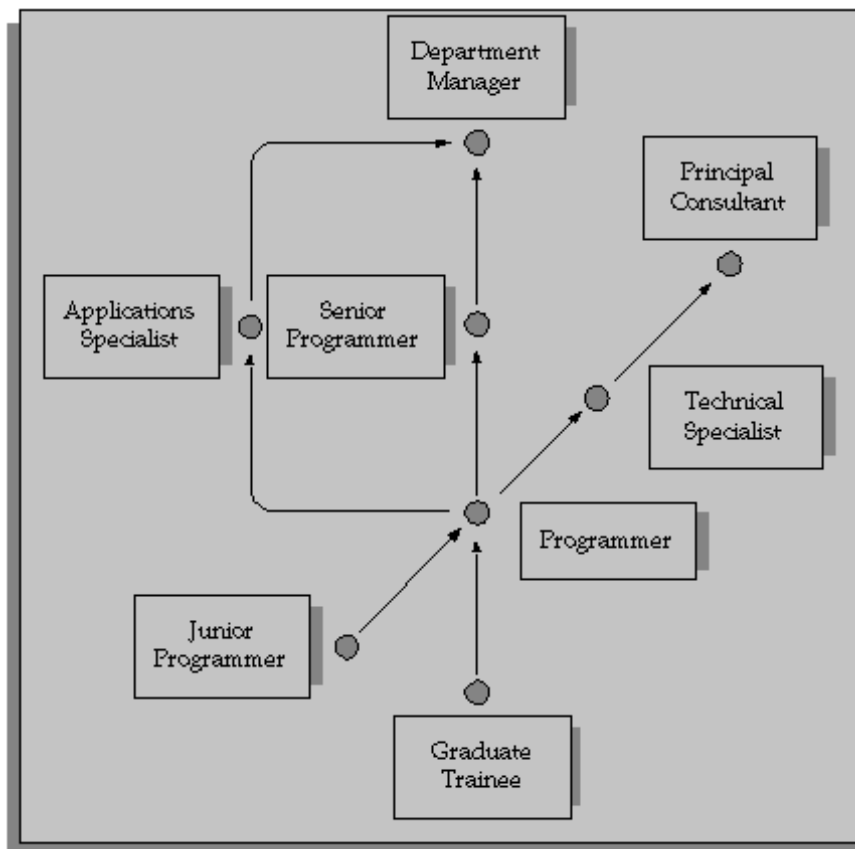
You will often use the Suitability Matching and Succession Planning functions together. You may for example use Suitability Matching to rank a person's competencies and then use Succession Planning to find a position this person can fill or can be trained to fill.

## Career Paths

A career path shows a possible progression to one job or position from any number of other jobs or positions. Career paths must be based on either job progression or position progression. You cannot mix the two. Career paths are based on the structures of your enterprise rather than the people you employ.

You can define as many career paths as you require, perhaps reflecting an individual's career priorities (such as a Management Path and a Technical Path). You build career paths from the top down. You can only enter a job or position once in any career path.

### Career Paths



Career paths based on job progression are built using the Map Career Path window.

See: Defining Career Paths, page 5-100

Career paths based on position progression are built using position hierarchies.



See: Creating a Position Hierarchy, *Oracle HRMS Enterprise and Workforce Management Guide*

## **Lines of Progression for AAP Reporting (US Only)**

If you are in the US, Oracle HR includes a special use of career paths based on jobs. For the AAP-Workforce Analysis report, you build career paths for jobs to constitute the *lines of progression* this report requires. You define these career paths just as you would any others based on jobs.

## **Career and Succession Plan Modeling Based on Jobs**

If your enterprise's career and succession planning is based upon jobs, you can use career paths to show possible progressions to one job from any number of other jobs.

### **Appraisals on the Web**

If you are using Oracle Self-Service Human Resources (SSHR) you can, with a Line Manager responsibility, select a career path for a person as part of the appraisal process. When you create the appraisal questionnaire, you create a list of values that contains the alternative career paths that can be selected for a person during an appraisal.

### **Special Information or Attachments**

If you are not using SSHR with a Line Manager responsibility, there are other ways to hold information about successor jobs against a person. For example:

- You can define a special information type to hold time intervals (such as immediate, three years, five years) and job names. You can also use the Job Requirements window to record people's names against each job for each time interval.
- An alternative approach is simply to record this information as text in comments or a word processed document attached to each employee's record.

## **Career and Succession Plan Modeling Based on Positions**

If your enterprise's career and succession planning is based upon positions, you can create additional position hierarchies to show any type of progression. These might represent existing line management structures, or even cut across departmental or job-type boundaries.

### **Succession Planning on the Web**

If you are using Oracle Self-Service Human Resources (SSHR), with a Line Manager responsibility, you can use the Succession Planning option. You can select a person's next position(s), or view their current position and see who is to succeed to that position.

### **Special Information Types or Attachments**

If you are not using SSHR and Line Manager responsibility, there are other ways to hold information about successor positions against a person. For example:

- You can define a special information type to hold time intervals (such as immediate, three years, five years) and position names against an employee. You can also use the Position Requirements window to record people's names against each position for each time interval.
- An alternative approach is simply to record this information as text in comments or a word processed document attached to each employee's record.

## Defining Career Paths

You define career paths to show the possible progression to one job or position from any number of other jobs or positions.

You define career paths for positions using position hierarchies.

See: Position Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

Job career paths are defined using the Career Path Names window and the Map Career Path window.

### To define a career path based on job progression:

1. Enter the names of the career paths you want to define in the Career Path Names window. Save the names.
2. Open the Map Career Path window. In the Name field, select the top job in the career path you are mapping.
3. Select the name of the career path in the Career Path Name field.
4. In the Job Progression From block, select all the jobs that are one level down from the top job in this career path.
5. To extend the career path from any one of these jobs, check the corresponding Down check box.

The window is redisplayed with your selected job now showing in the Name field.

You can move back up the career path by checking the Up check box.

6. Save your work.

## Modeling Career and Succession Plans Based on Jobs

Follow the procedure described below to show the possible career progression to one job from any number of other jobs.

### To model career and succession planning based on jobs:

1. Create the career paths and map career paths.

See: Defining Career Paths, page 5-100

Once you have created your career paths, you can derive personal progression from the person's assignment to a job, and the job's place within career paths.

2. Optionally, enter work requirements against jobs and enter personal work choices for your employees.

See: Entering Work Choices for a Job or Position, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Entering Work Choices for a Person, page 5-30

3. Create your appraisal questionnaire and perform appraisals for employees. You create appraisals using Oracle Self-Service Human Resources' (SSHR) Line Manager responsibility.

See: Setting up Appraisals and Questionnaires (SSHR), *Oracle HRMS Deploy Self-Service Capability Guide*

**Tip:** If you are not creating an appraisal using SSHR, consider holding succession plan information against people as attachments or using a special information type.

See: Special Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

## Modeling Career and Succession Plans Based on Positions

Follow the procedure described below to create additional position hierarchies to show any type of progression within an enterprise.

### To model career and succession planning based on positions:

1. Optionally, create position hierarchies to show career paths.

You would do this to show typical career progression.

See: Creating a Position Hierarchy, *Oracle HRMS Enterprise and Workforce Management Guide*

Once you have created the hierarchies, you can derive personal progression from the person's assignment to a position, and the position's place within the hierarchies.

2. Optionally, enter work choices against positions and enter personal work choices for your employees.

See: Entering Work Choices for a Job or Position, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Entering Work Choices for a Person, page 5-30

3. If you use Oracle SSHR, use the Succession Planning option to record one or more next positions for each employee.

See: Setting up Succession Planning (SSHR), *Oracle HRMS Deploy Self-Service Capability Guide*

**Note:** This option does not require you to have set up career paths using position hierarchies.

**Tip:** If you are not recording succession planning options using Oracle SSHR, consider holding succession plan information against people as attachments or using a special information type.

See: Special Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

# Skills Matching

## The Special Information Approach to Skills Matching

From Release 11 onwards, the recommended approach to holding and matching skills information is to define a framework of competencies. These provide the common language for a wide range of human resource activities including assessments, appraisals, employee profiling, career development, and recruitment. You can build up a wealth of skills information that can be maintained and used by employees and line managers themselves, using the web Direct Access interface.

However, Oracle HRMS continues to support the earlier approach to handling skills information, using Special Information Types. This is an alternative to the competence approach.

### What are Special Information Types (SITs)?

Special Information Types are a flexible way to hold additional information you require about people and, if necessary, to compare this information with the requirements of jobs or positions. For each Special Information Type you can define up to thirty fields to hold details of competencies, professional qualifications, education, and valid experience. For each person, job, or position, you can make multiple entries for each Special Information Type.

For example, suppose you want to store details of technical skills. You could set up the following fields:

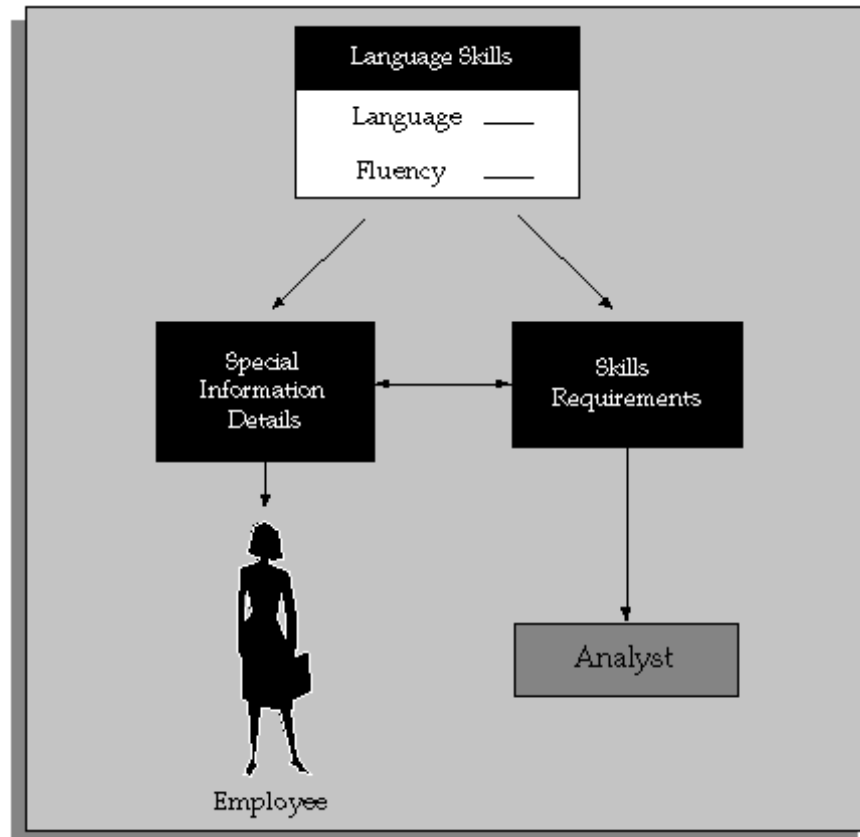
- Skills - with a list of valid values to control the vocabulary used to describe the skills
- Years Experience - to hold the number of years of experience in using the skills

You can display the fields you define in one or more of the following windows:

- Special Information, to record skills or experience for an employee or applicant
- Job Requirements, to hold skill requirements for a job
- Position Requirements, to hold skill requirements for a position
- Skill Provisions, to record the skills or qualifications provided by training activities in Oracle Training Administration

Using views and reports, you can then match people to posts, according to their skills or other attributes.

### Matching Skills Requirements to Special Information



### Tips for Defining Special Information Types to Hold Skills Information

- If you want to give different sets of people access to different categories of skills information, define each category as a separate Special Information Type. You can configure the Special Information window to display just one Special Information Type.
- If you want to match on a *range* of skills levels, it is easier to use numeric values. Use a description field to provide the meaning for each level. The description appears automatically when the number is chosen.
- You can use cross-validation to ensure that users enter correct combinations of segments. For example, you could ensure that when a language skill is entered, a fluency level is also selected.
- You can speed up data entry and minimize errors by defining an 'Alias' for common combinations of segment values. For example, completion of a course may always result in a specific certificate from a particular licensing body. A user could enter all of these values with a single Alias.
- If you want users to enter the precise title of a qualification (perhaps read from a resume), you cannot supply a list of values. However, consider providing additional fields with lists of values using broad terms such as 'degree-level' or 'science' to help users searching for information.

## Unstructured Information

You may want to hold some skills information, such as resumes, as unstructured, free text information. You can store this information as attachments to the People and Special Information windows.

## Skills Matching Report

The standard Skills Matching Report matches people against all the requirements you have entered for one job or position (held in Special Information Types).

The List People By Special Information window displays a list of people who match a particular profile for one Special Information Type.

## Running the Skills Matching Report

This report matches employees, applicants, or both against the requirements of one job or position (held in Special Information Types). You can select the closeness of the match you require.

You run reports in the Submit Requests window.

### To run the Skills Matching Report:

1. In the Name field, select Job and Position Skills Matching Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the Job or Position to which you want to match people.
4. Select the person type, or types, you require.
5. Select the closeness of match you require from one of the following levels:
  - One or more essential skills
  - All essential skills
  - All essential and one or more desirable skills
6. Choose the Submit button.

# Event and Attendance Administration

## Event and Attendance Administration

You can use the events and attendance administration features in Oracle Human Resources to:

- Set up events
- Book employees and applicants onto events
- Record information about employee interviews, such as disciplinary hearings and performance reviews

**Note:** The system administrator can create configured versions of the Event Bookings window so that you use one version for employees and another version for applicants.

## Event Bookings and Attendance

You can view all the events a person has attended or is scheduled to attend in the Book Events window. You can also enter new bookings here.

## Employee Reviews

You can use the Employee Review window to record information about any employee interview, such as a performance review, disciplinary hearing, or medical test.

To prepare for a performance review, you can view the employee's:

- Career history, using the Assignment History window  
See: Viewing a Worker's Assignment History, page 2-107
- Likely career paths or succession plans  
See: Career and Succession Planning, page 5-96

If you are using Oracle Self-Service Human Resources (SSHR), you can use web-based access to complete assessment and appraisal templates for your employees.

## Events, Reviews and Competence Profiles

If you have adopted the competence approach, you can use events or reviews as an opportunity to update your employees' competence profiles. For example, you may decide that employees' attendance at a team-leading seminar provided them with the Team-Leading competence at level 1. Once you have determined the competencies delivered by the event, you can update the appropriate employees' competence profiles.

## Events and Oracle Training Administration (OTA)

Oracle Training Administration (OTA) provides all the power and flexibility you need to schedule, administer and track training events.

See: Event Schedule Overview, *Oracle Learning Management User Guide*

## Entering Performance Ratings

You carry forward details from the Employee Review window to the Performance window (which opens from the Salary Administration window). In this window, you can enter performance ratings for an employee at any time. You can also schedule the next performance review, and, optionally, associate a salary change with a performance review.

**Note:** You cannot use a performance review entered through Oracle Self-Service Human Resources (SSHR).

In order to perform this task, performance rating values for the Lookup Type PERFORMANCE\_RATING must have been defined.

### To enter a performance rating for an existing review:

1. Select an existing review by one or all of the following:
  - Date
  - Location
  - Type
2. Select a performance rating.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically).

### To enter a new review and performance rating:

1. Enter the new review date.
2. Select a performance rating, if required.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically)

## Entering an Employee Review

You can record details of a review event using the Employee Review window.

Before you can enter employee reviews, different types of employee interview must have been defined as values for the Lookup Type EMP\_INTERVIEW\_TYPE. These interview types could include disciplinary hearings and performance reviews.

### To enter a review for an employee:

1. Select an interview type, and enter a start date. The other fields are optional.

If you select a location for the employee's review that has a time zone associated with it, the Timezone field displays the time zone with that location, regardless of your location.
2. Save the review.
3. You can select reviewers by name or employee number. Save your work.



If you want to enter a performance rating for the employee associated with this review, navigate to the Assignment or Salary Administration window.

See: Entering Performance Ratings, page 5-106

## Creating an Event

You use the Event Bookings window to create training events.

**Tip:** You could set up the Additional Event Details descriptive flexfield to record booking statuses (such as Wait Listed, Confirmed, and Attended). This descriptive flexfield displays on the Event Bookings window, the Employee Review window, and the Applicant Interview window.

Before you can create events, event types, such as departmental meeting or marketing presentation, must be defined as values for the Lookup Types EMP\_EVENT\_TYPE and APL\_EVENT\_TYPE.

**U.S. only:** All Tenure-specific events must begin with the word Tenure.

### To create an event:

1. Select the type of event then enter the date, time, supplying organization, location, and contact name.

**Note:** You can only select locations that are associated with a timezone. You associate a location with a timezone in the Location window.

2. Save the event.
3. You can select attendees by name or number in the Bookings block of this window.

# Workforce Intelligence Key Concepts for Competencies, Qualifications and Development

## Key Concepts for Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications and Development Intelligence enables you to investigate the competencies and proficiencies of employees and applicants.

The following concepts enable you to accurately interpret the results of the Competencies, Qualifications and Development intelligence reports:

### Competencies and Proficiencies

Within Oracle HRMS, you define competencies and proficiencies against a person and job. If a person has multiple assignments for the same job, these reports only count the person once. This ensures that trends remain accurate.

In order to appear in the reports, people must work for the required job and grade for a competence on the report run date.

**Note:** You must define competencies against jobs, and assign valid grades to jobs, or these reports will not be able to compare individual's proficiencies with their job competence requirements.

# Workforce Intelligence for Competencies, Qualifications and Development

## Competence (Skill) Development Detail Workbook

This workbook investigates the skills of your workforce, with regard to skills held by workers, skills required, or skills delivered through training, within your organization. The resulting information enables you to:

- View competencies owned by workers within your organization
- Analyze competence shortages within your organization
- Analyze competencies delivered by training

## Worksheets

This workbook has the following worksheets:

- Competence Delivered by Training Activity
- Competence Requirement
- Person Competence Profile

## Competence Delivered by Training Activity Worksheet

This worksheet reports on competencies delivered by training activities and events. The resulting information enables you to:

- Compare the competencies delivered by training to those required.
- Analyze training efficiency.

## Business Questions

*Which competencies do courses provide?*

## Competence Requirement Worksheet

This worksheet displays competence requirements for all organizations within a business group. The worksheet enables you to analyze competence requirements for business groups, organizations, jobs, positions, and grades. For each requirement you can investigate the:

- Competencies needed for a particular job.
- Skills shortages within an organization.

## Business Questions

*Which jobs require a particular competence, and at what level?*

## Headings and Calculations

This worksheet uses the following calculations:

- **Required For**

Populates the Required For column with the organization and job that require a particular competence.

## Person Competence Profile Worksheet

This worksheet enables you to analyze people's competency profiles by type. It enables you to:

- View people with similar competencies.
- Compare people of similar grade.

## Business Questions

*How proficient is an individual for a particular competence?*

## Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 5-108

## Appraisal Detail Workbook

This workbook provides the details of a range of appraisals, enabling you to view the participants, dates, and outcomes of multiple appraisals in one place. You can view all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

## Worksheets

This workbook contains two worksheets:

- Appraisal Detail by Organization Hierarchy
- Appraisal Detail by Supervisor Hierarchy

## Appraisal Detail by Organization Hierarchy Worksheet

This worksheet gives details of completed or ongoing appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, durations, and final ratings.

## Business Question

*What are the details of appraisals performed in my department?*

## Parameters

You must enter values for five parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organization
- Start Date
- End Date

## Appraisal Detail by Supervisor Hierarchy Worksheet

This worksheet gives details of completed or ongoing appraisals performed on workers under a specified supervisor. Data includes appraisee and appraiser names, dates, durations, and final ratings.

### Business Question

*What are the details of appraisals performed on my direct and indirect reports?*

### Parameters

You must enter values for three parameters:

- Supervisor
- Start Date
- End Date

## Competence Updates after Appraisal Workbook

The Competence Updates after Appraisal Workbook enables administrators and managers to view competence updates, both automatic and manual, made as a result of a completed appraisal. You can view competence updates for all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

### Worksheets

This workbook contains two worksheets:

- Competence Updates after Appraisal by Organization Hierarchy
- Competence Updates after Appraisal by Supervisor Hierarchy

## Competence Updates after Appraisal by Organization Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, competence names, and new and previous (if any) proficiency levels for each competence.

### Business Questions

*What competence updates have appraisees in my department received through appraisals?*

### Parameters

You must enter values for five parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organization
- Start Date
- End Date

## Competence Updates after Appraisal by Supervisor Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers under a specified supervisor.

### Business Questions

*What competence updates have my direct and indirect reports received through appraisals?*

### Parameters

You must enter values for three parameters:

- Supervisor
- Start Date
- End Date

---

## Windows and their Navigation Paths

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

The responsibility that you use determines which of these windows you can use and how you access them. Your system administrator sets up navigation menus and task flows for your responsibility. They may also create configured versions of some of these windows using different window titles.

### AAP Organization (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an AAP Organization.
3. Choose the Others button and select AAP Organization.

### Absence Attendance Type

1. Choose Total Compensation -> Basic -> Absence Types in the Navigator.

### Absence Detail

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Others button and select Absence.

Or:

1. Choose Fastpath -> Absence in the Navigator.
2. In the resulting Find window, query the person.

### Absence Tracking (Netherlands)

1. Choose People -> Absence Tracking in the Navigator.

### Accommodation (France)

1. Choose People -> Accommodations in the Navigator.

## Accrual Bands

1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.
2. Enter or query an accrual plan name.
3. Choose the Accrual Bands button.

## Accrual Plans

1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.

## Accruals

Do one of the following:

1. Choose View -> Employee Accruals in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Accruals button.

Or:

1. Choose Fastpath -> Accruals in the Navigator.
2. In the resulting Find window, query the person.

## Action Parameters

1. Choose Processes and Reports -> Action Parameters in the Navigator.

## Action Types

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Actions button.

## Activity Rate

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.

## Activity Variable Rates and Rules

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Variable Rates button.



## **Actual Premiums**

1. Choose Total Compensation -> Rates/Coverage Definitions -> Actual Premiums in the Navigator.

## **Additional Absence Detail Information <Employee> (CA)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Select Absence.

Or:

1. Choose People -> Fastpath -> Absence Information in the Navigator.

## **Additional Information for German HR Organizations (Germany)**

1. Choose Organization -> Define in the Navigator.
2. Choose the Others button.
3. Select German HR Organization.

## **Additional Information for German Tax Organizations (Germany)**

1. Choose Organization -> Define in the Navigator.
2. Choose the Others button.
3. Place the cursor on the German Tax Office field.

## **Address**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Address button.

Or:

1. Choose Fastpath -> Address in the Navigator.
2. In the resulting Find window, query the person.

## **Adjust Balance (Payroll)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.

3. Choose the Assignment button.
4. Choose the Others button and select Adjust Balance.

Or:

1. Choose Fastpath -> Adjust Balances in the Navigator.
2. In the resulting Find window, query the person.

## **Advanced Criteria**

1. Choose Benefits Extract -> Criteria Definition in the Navigator.
2. Query or enter a criteria definition and choose the Advanced tab.
3. Select a Criteria Type and choose the Details button.

## **Agency Appeals (FD)**

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Agency Appeals taskflow button.

## **Agreement Grades**

1. Choose Work Structures -> Collective Agreements -> Collective Agreement Grades in the Navigator.

## **Alien Data Window (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Choose the Alien Data button.

## **Alter Effective Date**

1. Choose Tools -> Alter Effective Date from the Tools menu.

## **Alternative Dispute Resolution (FD)**

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the ADR taskflow button.

## **Appeals (FD)**

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Appeals taskflow button.

## **Applicant Entry**

1. Choose Recruitment -> Applicant Quick Entry in the Navigator.

## **Applicant Interview**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.
4. Choose the Interview button.

## **Application**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.

Or:

1. Choose Fastpath -> Application in the Navigator.
2. In the resulting Find window, query the person.

## **Application Utilities Lookups**

1. Choose Other Definitions -> Application Utilities Lookups in the Navigator.
2. Enter or query a user-defined Type.

## **Appraisal Template**

1. Choose Career Management -> Appraisal Template in the Navigator.

## **Apprenticeship Tax Info (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.

## **Approvals: Grade / Step Progression**

1. Choose Work Structures -> Grade -> Progression Approval.

## **Approved Requests for Personnel Action (FD)**

1. Choose Request for Personnel Action -> Cancellation/Correction

## **ASSEDIC Information (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.

2. Enter or query an Establishment.
3. Choose the Others button and select ASSEDIC Information.

## Assessment Template

1. Choose Career Management -> Assessment Template in the Navigator.

## Assign Security Profiles

1. Choose Security -> Assign Security Profiles in the Navigator.

## Assignment

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.

Or:

1. Choose Fastpath -> Assignment in the Navigator.
2. In the resulting Find window, query the person.

## Assignment Budget Values

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant or an employee.
3. Do one of the following:

For an applicant:

- Choose the Others button and select Application.
- Choose the Budgets button.

For an employee:

- Choose the Assignment button.
- Choose the Others button and select Budget Values.

Or:

1. Choose Fastpath -> Assignment Budget in the Navigator.
2. In the resulting Find window, query the person.

## Assignment Criteria

1. Choose Payroll -> Assignment Set in the Navigator.
2. Enter or query an assignment set.

3. Choose the Criteria button.

## **Assignments Folder**

1. Choose View -> Lists -> Assignment Folder in the Navigator.

## **Assignment History**

1. Choose View -> Histories -> Employee Assignment in the Navigator.

## **Assignment Processes**

1. Choose View -> Payroll Process Results in the Navigator.
2. Enter or query a payroll process.
3. Choose the Assignment Process button.

## **Assignment Set**

1. Choose Payroll -> Assignment Set in the Navigator.

## **Assignment Statuses**

1. Choose Work Structures -> Status in the Navigator.

## **Aubry I Rebate (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Aubry I Rebate.

## **Aubry II Rebate (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Aubry II Rebate.

## **Australian Information (AU)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Australian Information tabbed region.

## **Authentication Activities (Advanced Benefits)**

1. Choose Total Compensation -> General Definitions -> Authentication Activities in the Navigator.

## Award/One-Time Payment (FD)

1. Choose Request for Personnel Action -> Award/One-Time Payment

## Awards and Decorations pages (France)

1. Choose People -> Awards and Decorations in the Navigator

## Balance (Payroll)

1. Choose Total Compensation -> Basic -> Balance in the Navigator.

## Balance Classifications (Payroll)

1. Choose Total Compensation -> Basic -> Balance in the Navigator.
2. Enter or query a balance.
3. Choose the Classifications button.

## Balance Dimensions (Payroll)

1. Choose Total Compensation -> Basic -> Balance in the Navigator.
2. Enter or query a balance.
3. Choose the Dimensions button.

## Balance Feed Control (Payroll)

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Balance Feed Control button.

## Balance Feeds (Payroll)

**Note:** This instance of the Balance Feeds window lets you select more than one balance for the element to feed.

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Balance Feeds button.

## Bargaining Unit (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Bargaining Unit.

## **Batch Assignment Entry**

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Enter or query a batch header.
3. Choose the Assignment Lines button.

## **Batch Header**

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.

## **Batch Lines**

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Enter or query a batch header.
3. Choose the Element Lines button.

## **Batch Process Parameters (Advanced Benefits)**

1. Choose Processes and Reports -> Batch Process Parameters in the Navigator.

## **Batch Summary**

1. Choose Mass Information eXchange: MIX -> BEE Summary in the Navigator.

## **Belgian Tax Information (Belgium)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.

## **Beneficiaries (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.
5. Select the element representing the benefit for which you are entering a beneficiary.
6. Choose the Others button and select Beneficiary.

## **Beneficiary Certifications**

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.

3. Choose the Designations tab.
4. Choose the Beneficiary tab.
5. Choose the Certifications button.

## **Benefit Contributions (US, CA)**

1. Choose Total Compensation -> Basic -> Benefit Contributions in the Navigator.

## **Benefits Assignment**

1. Choose People -> Total Comp Participation -> Person Benefits Assignment in the Navigator.

## **Benefits Authentication Form (Advanced Benefits) (US, UK, CA)**

1. Choose People -> Total Comp Contribution -> Benefits Authentication Form in the Navigator.

## **Benefits Balances**

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Benefits Balances in the Navigator.

## **Benefits Group**

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Benefits Group in the Navigator.

## **Benefits Pools (Advanced Benefits)**

1. Choose Total Compensation -> Rate/Coverage Definitions -> Benefits Pools in the Navigator.

## **Benefits Service Center (Advanced Benefits)**

1. Choose People -> Benefits Service Center in the Navigator.

## **Book Events**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Bookings.

## **Budget**

1. Choose Work Structures -> Budget -> Budget Details in the Navigator.
2. In the resulting Find window, query the budget.



3. Select a budget version.
4. Choose the Open button.

## Budget Characteristics

1. Choose Work Structures -> Budget -> Budget Characteristics in the Navigator.

## Budget Details

**Note:** Follow these steps if you are entering a budget that is not routed for approval.

1. Choose Work Structures -> Budget -> Budget Details in the Navigator.
2. In the resulting Find window, query the budget.
3. Select a budget version.
4. Choose the Open button.
5. Select a line item in the budget and choose the Periods button.

**Note:** Follow these steps if you are routing a budget for approval through a hierarchy of approvers.

6. Choose Work Structures -> Budget -> Worksheet in the Navigator.
7. Define the properties of the worksheet.
8. Choose the Create Worksheet button.
9. Edit the worksheet by entering values for budget line items.
10. Choose the Periods button.

## Budget Reallocation

1. Choose Work Structures -> Budget -> Budget Reallocation in the Navigator.

## Budget Set

1. Choose Work Structures -> Budget -> Budget Set in the Navigator.

## Budget Value Defaults

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Budget Value Defaults.

## Budgetary Calendar

1. Choose Work Structures -> Budget -> Budget Calendar in the Navigator.

## Budgets

1. Choose Work Structures -> Budget -> Budget Details in the Navigator.
2. In the resulting Find window, query the budget.

## Business Group Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Business Group Information.

## Cadre Life Insurance TA (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Cadre Life Insurance TA.

## Calendar

1. Choose Customer and Supplier Maintenance -> Calendar in the Navigator.

## Calendar (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.
2. Enter or query a pattern.
3. Choose the Calendars button.

## Calendar Usages (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.
2. Enter or query a pattern.
3. Choose the Calendars button.
4. Choose the Calendar Usages button.

## Career Path Names

1. Choose Work Structures -> Job -> Path Name in the Navigator.

## Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.

5. Choose the Certifications button.

## **Chamber Contribution Information (Germany)**

1. Choose Organization -> Define in the Navigator.
2. Choose the Others button.
3. Select German Chamber Tax.

## **Change Event Log**

1. Choose Mass Information eXchange -> System Extract -> Change Event Log in the Navigator.

## **Change in Data Element (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in Data Element.

## **Change in Duty Station (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in Duty Station.

## **Change in FEGLI (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in FEGLI.

## **Change in Hours (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in Hours.

## **Change in Retirement Plan (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in Retirement Plan.

## **Change in SCD (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in SCD.

## **Change in Tenure (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in Tenure.

## **Change in Veterans Preference (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in Veterans Preference.

## **Change in Work Schedule (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Change in Work Schedule.

## **Change to Lower Grade (FD)**

1. Choose Request for Personnel Action -> Salary Change -> Change to Lower Grade

## **Choose Set of Books**

1. Choose Customer and Supplier Maintenance -> Choose Set of Books in the Navigator.

## **Cities (US, CA)**

1. Choose Other Definitions -> Cities in the Navigator.

## **City Tax Rules <Employee> (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.
5. Choose the Tax information button from the State Tax Rules <Employee> window.
6. Choose the Tax information button from the County Tax Rules <Employee> window.

## **Claims (FD)**

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Claims taskflow button.

## **COBRA Beneficiaries (Basic Benefits) (US)**

1. Choose People -> Total Comp Participation -> COBRA Beneficiaries

## **COBRA Benefits (Basic Benefits) (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Benefits button.

## **COBRA Coverage (Basic Benefits) (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.

## **COBRA Payments (Basic Benefits) (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Payments button.

## **COBRA Statuses (Basic Benefits) (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Statuses button.

## **Collapse Life Events**

1. Choose Total Compensation -> General Definitions ->Additional Setup -> Collapse Life Events in the Navigator.

## **Collective Agreements**

1. Choose Work Structures -> Collective Agreements ->Define Collective Agreements in the Navigator.

## **Collective Agreement Entitlements**

1. Choose Work Structures -> Collective Agreements ->Define Collective Agreements in the Navigator.
2. Query a collective agreement.
3. Choose the Entitlements button.

## Collective Agreement Entitlement Items

1. Choose Work Structures -> Collective Agreements -> Define Entitlement Items in the Navigator.

## Collective Agreement Grades (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Collective Agreement Grades.

## Collective Agreement and Grade Progression Results

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Collective Agreement and Grade Progression Results.

## Collective Agreement Retained Rights

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Review Retained Rights.

## Columns

1. Choose Other Definitions -> Table Structure in the Navigator.
2. Enter or query a table.
3. Choose the Columns button.

## Committees

1. Choose Work Structures -> Organization -> Maintain Committees in the Navigator

## Communication Delivery Methods

1. Choose Fastpath -> Personal Delivery Method in the Navigator.

## **Communication Types**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.

## **Communication Type Children**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query a communication type kit.
3. Choose the View Children button.

## **Communication Type Delivery Methods**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Delivery button.

## **Communication Type Triggers**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Triggers button.

## **Communication Type Usages**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Usages button.

## **Compensation Surveys**

1. Choose Total Compensation -> Basic -> Compensation Survey in the Navigator.

## **Competence Details**

1. Choose Career Management -> Assessment Template in the Navigator.
2. Enter or query assessment details.
3. Choose the Competencies button.

## **Competence Profile**

1. Choose People -> Enter and Maintain in the Navigator.

2. Enter or query a person.
  3. Choose the Others button and select Competence Profile.
- Or:
1. Choose Fastpath -> Competence Profile in the Navigator.

## **Competence Qualifications**

1. Choose Career Management -> Competencies in the Navigator.
2. Enter or query a unit standard competence.
3. Choose the Qualifications button.

## **Competence Requirements**

1. Choose Career Management -> Competence Requirements in the Navigator.

## **Competence Types**

1. Choose Career Management -> Competence Types in the Navigator.

## **Competencies**

1. Choose Career Management -> Competencies in the Navigator.

## **Complaint People (FD)**

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Complaint People taskflow button.

## **Complaints(FD)**

1. Choose Complaints Tracking -> EEO Complaints Tracking

## **Complementary Pension Tranche 2 (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Complementary Pension Tranche 2.

## **Concurrent Requests (UK)**

1. Choose Processes and Reports -> View Requests in the Navigator.

## **Configurable Business Rules**

1. Choose Transaction Maintenance Forms -> Configurable Business Rules in the Navigator.



## **Consolidation Sets (Payroll)**

1. Choose Payroll -> Consolidation in the Navigator.

## **Constituency Information (for a Representative Body)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a representative body.
3. Choose the Others button and select Constituency.

## **Construction Tax Info (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Construction Tax Info.

## **Contact**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.

Or:

1. Choose Fastpath -> Contact in the Navigator.
2. In the resulting Find window, query the person.

## **Contexts**

1. Choose Security -> Contexts in the Navigator.

## **Contract**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button.
4. Choose Contracts.

Or:

1. Choose Fastpath -> Contracts in the Navigator.
2. In the resulting Find window, query the person.

## **Contribution History (Def Comp 457) (US)**

1. Choose View -> Histories -> Entries -> Contribution History

## **Control Totals**

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Choose the Totals button.

## **Conversion Rate Types**

1. Choose Payroll -> Conversion Rate Types in the Navigator.

## **Conversion to Appointment (FD)**

1. Choose Request for Personnel Action -> Conversion to Appointment

## **Corps, Grades and Pay Scales (France)**

1. Choose Total Compensation -> Programs and Plans -> Plan Design Wizard in the Navigator
2. Select the French Public Sector business area.

## **Corrective Actions (FD)**

1. Choose Complaints Tracking -> EEO Complaints Tracking
  - Choose the Corrective Actions taskflow button.

## **Costing**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Costing.

Or:

1. Choose Fastpath -> Costing in the Navigator.
2. In the resulting Find window, query the person.

## **Costing Information**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Costing.

## County Tax Rules <Employee> (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.
5. Choose the Tax information button from the State Tax Rules <Employee> window.

## Court Orders

1. Choose People -> Total Comp Enrollment -> Court Orders in the Navigator.

## Coverage Across Plan Types

1. Choose Total Compensation -> Rates/Coverage Definitions -> Coverage Across Plan Types in the Navigator.

## Coverage Calculations

1. Choose Total Compensation -> Rate/Coverage Definitions -> Coverage Calculations in the Navigator.

## Covered Dependents (CA)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.

## Covered Dependents (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.
5. Select the element representing the benefit for which you are entering a dependent.
6. Choose the Others button and select Dependents.

## Create Batch Lines

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Enter or query a batch header.
3. Choose the Assignment Set button.

## Criteria Definition

1. Choose Mass Information eXchange: MIX -> System Extract -> Criteria Definition in the Navigator.

## Custom Reports

1. Choose Processes and Reports -> Submit Custom Reports in the Navigator.

## Customer

1. Choose Customer and Supplier Maintenance -> Customer in the Navigator.

## DADS Files (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select DADS Files.

## DADS Types (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.

## Database Items

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Show Items button.

## DateTrack History Change Field Summary

1. Choose Tools -> Datetrack History from the Tools menu.

## Deduction (Payroll) (US, CA)

1. Choose Total Compensation -> Basic -> Deductions in the Navigator.

## Define Combinations

1. Choose Total Compensation -> Rate/Coverage Definitions -> Combinations in the Navigator.

## Define Extract

1. Choose Benefits Extract -> Extract Definition in the Navigator.

## Define Function

1. Choose Other Definitions -> Formula Functions in the Navigator.

## Define QuickPaint Report

1. Choose Processes and Reports -> Define a QuickPaint Report in the Navigator.

## Define Task Flow

1. Choose Security -> Task Flow Definitions in the Navigator.

## Define Task Flow Nodes

1. Choose Security -> Task Flow Nodes in the Navigator.

## Delete Person

1. Choose People -> Delete Personal Records in the Navigator.

## Denial of Within Grade Increase (FD)

1. Choose Request for Personnel Action -> Salary Change -> Denial of Within Grade Increase

## Dependent/Beneficiary Designation

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Dependent/Beneficiary Designation in the Navigator.

Or:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Designees button.

## Dependent Certifications

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program.
3. Choose the Dependent Coverage tabbed region
4. Choose the Certifications button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the Designations tab.
4. Choose the Dependent tab.
5. Choose the Certifications button.

## **Dependent Change of Life Event**

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.

## **Dependent Change of Life Event Certification**

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.
4. Select a life event and choose the Dependent Change of Life Event Certifications button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.
5. Select a life event and choose the Dependent Change of Life Event Certifications button.

## Dependent Coverage Eligibility Profiles

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Dependent Coverage in the Navigator.

## Dependent Eligibility Profiles

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Eligibility Profiles button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Eligibility Profiles button.

## Derived Factors

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Derived Factors in the Navigator.

Or:

1. Choose Work Structures -> Collective Agreements -> Define Derived Factors in the Navigator.

## Derive Notice Period (Belgium)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.
4. Choose Derive Notice Period.

Or

Choose FastPath -> End Employment.

5. Enter or query an employee.
6. Choose Derive Notice Period.

## Designation Requirements

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Options in the Navigator.

2. Query or enter an option.
3. Choose the Designation Requirements button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Designations button.

## **Disability (Not US, Not CA)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Disabilities.

Or:

1. Choose Fastpath -> Disabilities in the Navigator.
2. In the resulting Find window, query the person.

## **Documents of Record**

1. Choose People -> Search Documents of Record in the Navigator.  
or
2. Choose People -> Enter and Maintain -> Others -> Documents of Record in the Navigator.  
or
3. Choose Documents of Record from the Manager Self-Service or Employee Self-Service menu.

## **Dynamic Trigger Definition**

1. Choose Other Definitions -> Dynamic Trigger Definition in the Navigator.

## **Dynamic Trigger Functional Area Grouping**

1. Choose Other Definitions -> Dynamic Trigger Functional Area Grouping in the Navigator.

## **Duty Stations**

1. Choose Federal Maintenance Forms -> Duty Stations in the Navigator.



## Earnings (Payroll) (US, CA)

1. Choose Total Compensation -> Basic -> Earnings in the Navigator.

## Edit Formula

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Edit button.

## EEO-1 Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select EEO-1 Filing.

## Electable Choices

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button
3. Choose the Electable Choices button.

## Elections

1. Choose Work Structures -> Elections

## Element

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.

## Element and Distribution Set

1. Choose Payroll -> Element Set in the Navigator.

## Element Classifications (Payroll)

1. Choose Total Compensation -> Basic -> Classification in the Navigator.

## Element Entries

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.

Or:

1. Choose Fastpath -> Entries in the Navigator.
2. In the resulting Find window, query the person.

## **Element Link**

1. Choose Total Compensation -> Basic -> Link in the Navigator.

## **Element Withholding Reasons (UK)**

1. Choose SSP/SMP -> Element Withholding Reasons in the Navigator.

## **Eligibility**

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.
4. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Option Eligibility button.
5. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plans and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Participation Eligibility button.
6. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.
4. Choose the Eligibility button.

## Eligibility Criteria

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Maintain Eligibility Criteria in the navigator.

## Employee Assignment Processes (Payroll)

1. Choose View -> Assignment Process Results in the Navigator.

## Employment Certification (Hungary)

1. Choose Hungarian Web ADI Reports > Create Document in the Navigator.

## Employee Review

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Reviews.

Or:

1. Choose Fastpath -> Employee Review in the Navigator.
2. In the resulting Find window, query the person.

## Employee Run Result History (Payroll)

1. Choose View -> Histories -> Run Results in the Navigator.

Or:

1. Choose Fastpath -> End Employment in the Navigator.
2. In the resulting Find window, query the person.

## Employer Identification (US, CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Employer Identification

## Employment Declaration (AU)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Declaration button.

## Employment Equity Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. Position the cursor in the Organization Classifications Name field.
4. Select the Business Group from the List of Values.
5. Position the cursor in the Field with the entry Business Group.
6. Choose the Others button.
7. Select Employment Equity Information and click OK.
8. Double-click in the FlexField to display the window.

## Employment History (UK)

1. Choose FastPath -> Employment History in the Navigator.

## End Application

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Application.

Or:

1. Choose Fastpath -> End Application in the Navigator.
2. In the resulting Find window, query the person.

## End Employment

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.

Or:

1. Choose Fastpath -> End Employment in the Navigator.

## Enrollment Action (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Enrollment Action Types in the Navigator.

## Enrollment Opportunities

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button.

## Enrollment Override

1. Choose People -> Total Comp Enrollment -> Enrollment Override in the Navigator.

## Enrollment Rules

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Timing tab.
4. Choose the Scheduled tab or the Life Event tab.
5. Choose the Enrollment Rules button.

## Enter Contingent Workers

1. Choose People -> Maintain Using Templates -> Enter Contingent Workers in the Navigator.

## Enter Employees

1. Choose People -> Maintain Using Templates -> Enter Employees in the Navigator.

## Entry Values

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.
5. Select an entry and choose the Entry Values button.

## Establishment EEO-1 Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Establishment EEO-1 Filing.

## Establishment VETS-100 Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Establishment VETS-100 Filing.

## Event Bookings

Do one of the following:

1. Choose People -> Events and Bookings in the Navigator.

Or:

1. Choose Fastpath -> Event in the Navigator.
2. In the resulting Find window, query the person.

## **Event Groups**

1. Choose Total Compensation -> Basic -> Event Groups in the Navigator.

## **Extension of NTE (FD)**

1. Choose Request for Personnel Action -> Extension of NTE

## **External/Manual Payments (Payroll)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select External Pay.

Or:

1. Choose Fastpath -> External/Manual Payments in the Navigator.
2. In the resulting Find window, query the person.

## **Extra Details of Service**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Extra Details of Service.

Or:

1. Choose Fastpath -> Extra Details of Service.
2. In the resulting Find window, query the person.

## **Extra Element Information**

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Extra Information button.

## **Extra Person Information (FD)**

1. Choose People -> Enter and Maintain
2. Enter or query a person.
3. Choose the Others button and select Extra Information.

## **Extra Person Information Window (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Choose Extra Information.
5. Choose a Type.
6. Choose Details.

## **Extract Definition**

1. Choose Mass Information Exchange -> System Extract -> Extract Definition in the Navigator.

## **Extract Results**

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.

## **Extract Results Details**

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Details button.

## **Extract Results Errors**

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Errors and Warnings button.

## **Extract Results Header and Trailer**

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Header and Trailer button.

## **Families, Nature of Action (FD)**

1. Choose Federal Maintenance Forms -> Families and NOA Families.

## **Federal Tax Information <Employee> (CA)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Select the Federal Tax Information region (if not already selected).

Or:

1. Choose People -> Fastpath -> Tax Sign-up in the Navigator.
2. In the resulting Find window, query an employee.
3. Select the Federal Tax Information region.

## **Federal Tax Rules (US)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Federal Tax Rules

## **Federal Tax Rules <Employee> (US)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Tax Information button.

## **File Layout Advanced Conditions (US, UK, CA)**

1. Choose Benefits Extract -> Layout Definition in the Navigator.
2. Choose the File Layout tab and query or enter a file layout.
3. Select a record and choose the Advanced Conditions button.

## **File Layout Include Conditions**

1. Choose Mass Information eXchange -> System Extract -> Layout Definition in the Navigator.
2. Choose the File Layout tab and query or enter a file layout.
3. Select a record and choose the Include Conditions button.

## **Financials Options**

1. Choose Customer and Supplier Maintenance -> Financials Options in the Navigator.



## **Flex Credits (Advanced Benefits)**

1. Choose Total Compensation -> Rate/Coverage Definitions -> Flex Credits in the Navigator.

## **Flex Program (Advanced Benefits)**

1. Choose People -> Total Comp Enrollment -> Flex Program in the Navigator.

## **Form 941 Information (US)**

1. Choose View -> Tax Information -> Form 941 Information in the Navigator.

## **Form Customization**

1. Choose Security -> CustomForm in the Navigator.

## **Forms Configurator - see People Management Configurator**

## **Formula**

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.

## **Formula Result Rules (Payroll):**

1. Choose Total Compensation -> Basic -> Formula Results in the Navigator.

## **Forward Notification To (FD)**

1. Choose Workflow Inbox
2. Choose a notification and then choose the Reroute button.

## **Frequency Rules (Payroll)**

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Frequency Rules button.

## **Funding Distribution**

1. Choose Work Structures -> Budget -> Worksheet in the Navigator.
2. Choose the Periods button to open the Budget Details window.
3. Choose the Budget Sets tab.
4. Choose the Budget Set Distribution button.

## **GL Daily Rates**

1. Choose Payroll -> GL Daily Rates in the Navigator.

## **GL Daily Rates (US, CA)**

1. Choose Total Compensation -> Basic -> Global Values in the Navigator.

## **GL Map (Payroll)**

1. Choose Payroll -> GL Flexfield Map in the Navigator.

## **Globals**

1. Choose Total Compensation -> Basic -> Global Values in the Navigator.

## **Global Hierarchy**

1. Choose Work Structures -> Organization -> Global Hierarchy in the Navigator.

## **Global Organization Hierarchy Diagrammer**

1. Choose Work Structures -> Organization -> Global Diagrammer in the Navigator.

## **Global Pay Scale**

1. Choose Work Structures -> Grade -> Global Pay Scale in the Navigator.

## **Global Security Profile**

1. Choose Security -> Global Security Profiles in the Navigator.

## **Goods and Services**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Goods and Services in the Navigator.

## **Grade Rate**

1. Choose Work Structures -> Grade -> Grade Rate in the Navigator.

## **Grade Scale**

1. Choose Work Structures -> Grade -> Grade Steps and Points in the Navigator.

## **Grade Step Placement**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.

2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Grade Step.

Or:

1. Choose Fastpath -> Grade Step in the Navigator.
2. In the resulting Find window, query the person.

## **Grades**

1. Choose Work Structures -> Grade -> Description in the Navigator.

## **Grades (for a Constituency)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Grades.

## **GREs and other information <Employee> (CA)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Select the GREs and other information region.

## **Hiring Applicants**

1. Choose People -> Maintain Using Templates -> Hire Applicants in the Navigator.

## **Hungarian Absence Report (Hungary)**

1. Choose Hungarian Web ADI Reports > Create Document in the Navigator.

## **Imputed Income**

1. Choose Total Compensation -> Rate/Coverage Definitions -> Imputed Income in the Navigator.

## **Information Type Security (US, UK, CA)**

1. Choose Security -> Information Types Security in the Navigator.

## **Information Type Security (FD)**

1. Choose Security -> Information Types

## **Input Values**

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

## **Insurance Provider (for a Company) (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Insurance Provider.

## **Insurance Provider (for an Establishment) (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Insurance Providers.

## **Insurance Provider Information (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Pension Provider.
3. Choose the Others button and select Insurance Provider Information.

## **Investment Options**

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Savings Plan in the Navigator.
2. Query a person.
3. Choose the Investment Options button.

## **Job**

1. Choose Work Structures -> Job -> Description in the Navigator.

## **Jobs (for a Constituency)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Jobs.

## **Job Evaluation**

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Enter or query a job.

3. Choose the Evaluation button.

## **Job Grade (CA)**

1. Choose Work Structures -> Job -> Job Grade in the Navigator.

## **Job Groups**

1. Choose Work Structures -> Job -> Job Groups in the Navigator.

## **Job Requirements**

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Enter or query a job.
3. Choose the Requirements button.

## **KR Mass Assignment Update**

1. Choose People -> Mass Updates for Person -> Mass Update of CWK and Employee Assignments in the Navigator.

## **KR Mass Employee Assignment Update**

1. Choose People -> Mass Updates for Person -> KR Mass Update of Employee Assignments in the Navigator.

## **Layout Definition**

1. Choose Benefits Extract -> Layout Definition in the Navigator.

## **Legal Employer Information (AU)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Select GRE/Legal Entity and choose the Others button.
4. Select Legal Employer.
5. Click in the blank field.

## **Letter (for letters)**

1. Choose Work Structures -> Recruitment Letter Type in the Navigator.

## **Letter (for contracts)**

1. Choose Work Structures -> Contract Letter Type in the Navigator.

## Life Event

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Life Event button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Life Event button.

## Life Event Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Life Event Certifications button.

## Life Event Reason Impact on Eligibility (Advanced Benefits)

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Life Event Eligibility button.

## Life Event Reasons

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.

## Limit Rules (Payroll) (US)

1. Choose View -> Wage Attachments -> Limit Rules in the Navigator.

## Link Input Values

1. Choose Total Compensation -> Basic -> Link in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

## List Assignments

1. Choose View -> Lists -> Assignments in the Navigator.

## List Budget Variance by Organization (AU)

1. Choose View -> Organization Budgets in the Navigator.

## List Employees by Absence Type

1. Choose View -> Lists -> Employees by Absence Type in the Navigator.

## List Employees by Element

1. Choose View -> Lists -> Employees by Element in the Navigator.

## List People by Assignment

1. Choose View -> Lists -> People by Assignment in the Navigator.

## List People by Special Information

1. Choose View -> Lists -> People by Special Information in the Navigator.

## List Workforce by Organization

1. Choose View -> Lists -> Workforce by Organization in the Navigator.

## List Workforce by Position

1. Choose View -> Lists -> Workforce by Position in the Navigator.

## List Workforce by Position Hierarchy

1. Choose View -> Lists -> Workforce by Position Hierarchy in the Navigator.

## Local Tax Rules (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Local Tax Rules.

## Locality Pay (FD)

1. Choose Request for Personnel Action -> Salary Change -> Locality Pay

## Location

1. Choose Work Structures -> Location in the Navigator.

## **Locations (for a Constituency)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Locations.

## **Lookups**

1. Choose Other Definitions -> Application Utilities Lookups in the Navigator.

## **Maintain Contingent Workers**

1. Choose People -> Maintain Using Templates -> Maintain Contingent Workers in the Navigator.

## **Maintain Criteria Rate Definitions**

1. Choose Total Compensation -> Rate/Coverage Definitions -> Maintain Criteria Rate Definitions in the Navigator.

## **Maintain Eligibility Criteria**

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Maintain Eligibility Criteria in the Navigator.

## **Maintain Employees**

1. Choose People -> Maintain Using Templates -> Maintain Employees in the Navigator.

## **Maintain On Line Activities (Advanced Benefits)**

1. Choose Total Compensation -> General Definitions -> Authentication Activities in the Navigator.

## **Maintain Options Eligibility**

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Option Eligibility button.

## **Maintain Plan Eligibility**

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.



## **Maintain Plan Options**

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.

## **Maintain Plan Primary Care Provider**

1. Choose Total Compensation -> Programs and Plans -> Plan Primary Care Providers in the Navigator.

## **Maintain Plan Related Details**

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Details button.

## **Maintain Plan Third Party Identifiers**

1. Choose Total Compensation -> Programs and Plans -> Plan Third Party Identifier in the Navigator.
2. In the resulting Find window, query the plan.

## **Maintain Pop Up Messages (Advanced Benefits)**

1. Choose Total Compensation -> General Definitions -> Message Configuration in the Navigator.

## **Maintain Rate Matrix**

1. Choose Total Compensation -> Rate/Coverage Definitions -> Maintain Rate Matrix in the Navigator.

## **Maintain Visa Window (US)**

1. Choose People -> Maintain Using Templates -> Maintain Visa in the Navigator.
2. Choose an employee.

## **Manual Payments**

1. Choose People -> Total Comp Contribution -> Manual Payments in the Navigator.
2. In the resulting Find window, query the person.

## **Map Career Path**

1. Choose Work Structures -> Job -> Career Path in the Navigator.

## **Map Salary Survey (US, UK, CA)**

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Complete the Position window and save your work.
3. Choose the Define Survey Map button.

Or:

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Complete the Job window and save your work.
3. Choose the Define Salary Map button.

## **Mass Applicant Assignment Update**

1. Choose People -> Mass Updates for Person -> Mass Update of Applicant Assignments in the Navigator.

## **Mass Assignment Update**

1. Choose People -> Mass Updates for Person -> Mass Update of Assignments in the Navigator.

## **Mass Awards (FD)**

1. Choose Mass Actions -> Mass Awards
2. Choose Preview Mass Awards

## **Mass Employee Assignment Update**

1. Choose People -> Mass Updates for Person -> Mass Update of Employee Assignments in the Navigator.

## **Mass Move**

1. Choose Work Structures -> Position -> Mass Move in the Navigator.

## **Mass Move - Assignments**

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.
6. Complete the Mass Move - Positions window.
7. Choose the Assignments button.

## Mass Move - Messages

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window and choose the Find button.
5. Complete the Mass Move - Positions window and choose the Assignments button.
6. Complete the Mass Move - Assignments window and close it.
7. From the Mass Move - Positions window, choose the Valid Grades button.
8. Complete the Valid Grades window and close it.
9. Close the Mass Move - Positions window.
10. From the Mass Move window, choose the Execute button.
11. If the Status field shows In Error or Complete with Warnings, a Message button appears.
12. If the Message button appears, choose it to view messages in the Mass Move - Messages window.

**Note:** Alternatively, you can view messages for saved (but not yet successfully executed) mass moves as follows:

13. Choose Work Structures -> Position -> Mass Move in the Navigator.
14. Enter the name of the saved mass move in the Description field.
15. When the Mass Move window is populated with data and the Message button appears, choose the Message button .

## Mass Move - Positions

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window.
3. Save your work.
4. Choose the Positions button.
5. In the resulting Find Positions window, select or enter a Source Job and Source Position.
6. Choose the Find button.

## Mass Move - Valid Grades

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.

6. Complete the Mass Move - Positions window.
7. Choose the Valid Grades button.

## **Mass Position Update**

1. Choose Work Structures -> Position -> Mass Position Update

## **Mass Realignment (FD)**

1. Choose Mass Actions ->Mass Realignment
2. Choose Preview Mass Realignment

## **Mass Salary (FD)**

1. Choose Mass Actions ->Mass Salary
2. Choose one of the following mass salary change actions:
  - Preview Mass Standard Pay Adjustment
  - Preview Mass Percent Pay Adjustment
  - Preview Mass Locality Adjustment
  - Preview Pay Table Identifier Change

## **Mass Transfer In (FD)**

1. Choose Mass Actions ->Mass Transfer In
2. Choose Preview Mass Transfer In

## **Mass Transfer Out (FD)**

1. Choose Mass Actions ->Mass Transfer Out
2. Choose Preview Mass Transfer Out

## **Mass UK Applicant Ass Update**

1. Choose People -> Mass Updates for Person -> Mass Update of Applicant Assignments in the Navigator.

## **Mass UK Assignment Update**

1. Choose People -> Mass Updates for Person -> Mass Update of Assignments in the Navigator.

## **Mass UK Employee Assignment Update**

1. Choose People -> Mass Updates for Person -> Mass Update of Employee Assignments in the Navigator.

## Mass Update of Applicants

1. Choose Recruitment -> Mass Update of Applicants in the Navigator.

## Maternity (UK)

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Maternity button.

## Maternity Evidence (UK)

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.
4. Enter or query a maternity absence.
5. Choose the Evidence button.

## Maternity Pay (UK)

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.
4. Enter or query a maternity absence.
5. Choose the SSP/SMP button.

## MD/DDS Nurse Pay (FD)

1. Choose Request for Personnel Action -> Salary Change -> MDDDS Nurse Pay

## Medical Assessments

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Medical Assessments.

Or:

1. Choose Fastpath -> Medical Assessments in the Navigator.
2. In the resulting Find window, query the person.

## Messages

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.

2. Choose the Messages button.

## **Message Configuration (Advanced Benefits)**

1. Choose Total Compensation -> General Definitions -> Message Configuration in the Navigator.

## **Mileage Element Template (UK)**

1. Choose Total Compensation -> Basic -> Mileage Element Template in the Navigator.

## **Miscellaneous Plan**

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Miscellaneous Plan in the Navigator.

## **MIX Batch Header**

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.

## **Monitor Batch Processes (Advanced Benefits)**

1. Choose Processes and Reports -> Monitor Batch Processes in the Navigator.

## **Monthly Participant Premium**

1. Choose People -> Total Comp Contribution -> Monthly Participant Premium in the Navigator.

## **Monthly Plan or Option Premium**

1. Choose -> People -> Total Comp Contribution -> Monthly Premium in the Navigator.

## **Multiple Worksite Reporting (US)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Multiple Worksite Reporting

## **NACHA Rules (US)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select NACHA Rules

## **Name Change (FD)**

1. Choose Request for Personnel Action -> Change Actions -> Name Change i

## **Nature of Action Legal Authorities (FD)**

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> NOA Legal Authorities.

## **Net Calculation Rules**

1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.
2. Enter or query an accrual plan name.
3. Choose the Net Calculation Rules button.

## **New Hire Reporting (US)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a GRE.
3. Choose the Others button.
4. Select New Hire Reporting

## **New Zealand Information (NZ)**

1. Choose People -> Enter and Maintain.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the New Zealand Information tab.

## **NOA Codes and Remarks (FD)**

1. Choose Federal Maintenance Forms -> NOA Codes and Remarks

## **Non-Flex Program**

1. Choose People -> Total Comp Enrollment -> Non-Flex Program in the Navigator.

## **Non Pay / Non Duty Status (FD)**

1. Choose Request for Personnel Action -> Non Pay / Non Duty Status

## **Notifications (FD)**

1. Choose Request for Personnel Action -> Workflow Inbox

## **Notifications Summary (FD)**

Do one of the following:

1. Choose Workflow Inbox

## Options

1. Choose Total Compensation -> Programs and Plans -> Options in the Navigator.

## Organization

1. Choose Work Structures -> Organization -> Description in the Navigator.

## Organization Hierarchy

1. Choose Work Structures -> Organization -> Hierarchy in the Navigator.

## Organization Hierarchy Diagrammer

1. Choose Work Structures -> Organization -> Diagrammer in the Navigator.

## Organization Hierarchies (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Organization Hierarchies.

## Organization Manager Relationship

1. Choose Work Structures -> Organization -> Organization Manager in the Navigator.

## Organizational Payment Method

1. Choose Payroll -> Payment Methods in the Navigator.

## Organizations (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Organizations.

## Other Pay (FD)

1. Choose Request for Personnel Action -> Salary Change -> Other Pay

## Other Rates

1. Choose People -> Total Comp Enrollment -> Non-Flex Program in the Navigator.
2. Query a person.
3. Choose the Others button and select Other Rates.



## Outcomes Achieved

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Competence Profile.
4. Select a unit standard competence and choose the Outcomes Achieved button.

Or:

1. Choose Fastpath -> Competencies in the Navigator.
2. Query a person.
3. Select a unit standard competence and choose the Outcomes Achieved button.

## Outcomes and Assessment Criteria

1. Choose Career Management -> Competencies in the Navigator.
2. Enter or query a unit standard competence.
3. Choose the Outcomes button.

## P45 (Payroll) (UK)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Tax Information.

Or:

1. Choose FastPath -> UK P45 Form in the Navigator.
2. In the resulting Find window, query the person.

## Parent Organization

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Parent Organization.

## Part Time Rebate (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Part Time Rebate.

## Participant

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Participant in the Navigator.

## Participation Eligibility Profiles

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Participation Eligibility Profiles
- Or:
1. Choose Work Structures -> Collective Agreements -> Define Eligibility Profiles in the Navigator.

## Participation Overrides (Advanced Benefits)

1. Choose People -> Total Comp Participation -> Participation Overrides in the Navigator.

## Pattern (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.

## Pattern Time Units (UK)

1. Choose SSP/SMP -> Pattern Time Units in the Navigator.

## Pay Adjustment (FD)

1. Choose Request for Personnel Action -> Salary Change -> Pay Adjustment.

## Pay Advice Report (Payroll) (UK)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Statement of Earnings.

Or:

1. Choose FastPath -> Statement of Earnings in the Navigator.
2. In the resulting Find window, query the person.

## Pay Plans (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Pay Plans.

## **Pay Scale**

1. Choose Work Structures -> Grade -> Pay Scale in the Navigator.

## **Payment Schedule**

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query or enter a flex credit definition and choose the Processing tabbed region.
3. Choose the Payment Schedule button.

## **Payments**

1. Choose People -> Total Comp Contribution -> Record Contribution or Distribution
2. Choose the View Payments window.

## **Payroll**

1. Choose Payroll -> Description in the Navigator.

## **Payroll Balances (UK)**

1. Choose Work Structures -> Organization -> Description in the Navigator
2. Enter or query a Business Group
3. Choose the Others button and select Payroll Balances

## **Payroll Elements (UK)**

1. Choose Work Structures -> Organization -> Description in the Navigator
2. Enter or query a Business Group
3. Choose the Others button and select Payroll Elements

## **Payroll Processes (Payroll)**

1. Choose View -> Payroll Process Results in the Navigator.

## **Payroll Profile**

1. Choose view -> Payroll Profile in the Navigator.

## **Pension Provider (for a Company) (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Pension Provider.

## **Pension Provider (for an Establishment)(France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Pension Providers.

## **Pension Provider Information (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Pension Provider.
3. Choose the Others button and select Pension Provider Information.

## **Pension Schemes (Hungary)**

1. Choose Total Compensation -> Basic in the Navigator.
2. Choose Pension Schemes.

## **People**

1. Choose People -> Enter and Maintain in the Navigator.

## **People Folder**

1. Choose View -> Lists -> People Folder in the Navigator.

## **People Management Configurator (formerly Forms Configurator)**

1. Choose Security -> People Management Configurator in the Navigator.

## **Performance**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Salary button.
4. Choose the Performance button.

Or:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Others button and select Performance.

## **Period Dates**

1. Choose Payroll -> Description in the Navigator.
2. Enter or query a payroll.

3. Choose the Period Dates button.

## **Period-to-Date Limits**

Do one of the following:

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Period-to-Date Limits in the Navigator.

Or:

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.
4. Choose the Period to Date Limit button.

## **Period Types**

1. Choose Other Definitions -> Time Periods in the Navigator.

## **Person Benefits Assignment**

1. Choose People -> Total Comp Participation -> Person Benefits Assignment

## **Person Benefits Balances**

1. Choose People -> Total Comp Participation -> Person Benefits Balances in the Navigator.

## **Person Changes**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.
4. Choose the Define Person Change button.

## **Person Changes Cause Life Events**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.

## Person Communications (Advanced Benefits)

1. Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Communications in the Navigator.

## Person Enrollment Action Items (Advanced Benefits)

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Enrollment Action Items in the Navigator.

Or:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Action Items button.

## Person Enrollment Certificates (Advanced Benefits) (CA)

1. Choose People -> Enrollment Process -> Person Enrollment Certificates in the Navigator.

## Person Enrollment Certifications (Advanced Benefits)

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Enrollment Certifications in the Navigator.

Or:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Certifications button.

## Person Life Events

### Person Life Events

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Person Life Events

Or (Advanced Benefits):

Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Life Events

## Person Primary Care Provider

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Person Primary Care Provider in the Navigator.

## Person Summary (FD)

1. Choose Person Summary

## Person Types

1. Choose Other Definitions -> Person Types in the Navigator.

## Person Type Usage

1. Choose Fastpath -> Person Type Usage in the Navigator.

## Personal Payment Method

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Pay Method button, or choose the Others button and select Pay Method.

Or:

1. Choose Fastpath -> Pay Method in the Navigator.
2. In the resulting Find window, query the person.

## Phone Numbers

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Choose Phones.

Or:

1. Choose Fastpath -> Phones in the Navigator.
2. In the resulting Find window, query the person.

## Picture

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator
2. Enter or query a person.
3. Choose the Picture button.

Or:

1. Choose Fastpath -> Picture in the Navigator.

2. In the resulting Find window, query the person.

## **Plan and Plan Type**

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.

## **Plan Design Copy**

1. Choose Total Compensation -> Programs and Plans -> Plan Design Copy in the Navigator.

## **Plan Design Wizard**

1. Choose Total Compensation -> Programs and Plans -> Plan Design Wizard

## **Plan Enrollment Requirements**

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.

## **Plan in Program Participation Eligibility**

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plans tab.
5. Choose the Participation Eligibility button.

## **Plan Reimbursement**

1. Choose Total Compensation -> General Definitions -> Programs and Plans -> Plan Reimbursement in the Navigator.

## **Plan Type Participation Eligibility**

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Type tab.
5. Choose the Participation Eligibility button.



## **Plan Types**

1. Choose Total Compensation -> Programs and Plans -> Plan Types in the Navigator.

## **Plans**

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.

## **Position**

1. Choose Work Structures -> Position -> Description in the Navigator.

## **Position (FD)**

1. Choose Work Structures -> Position -> Description

## **Position Abolish (FD)**

1. Choose Request for Personnel Action -> Federal Position -> Abolish

## **Position Change (FD)**

1. Choose Request for Personnel Action -> Federal Position Change

## **Position Copy**

1. Choose Work Structures -> Position -> Position Copy in the Navigator.

## **Position Copy (FD)**

1. Choose Work Structures -> Position -> Description

## **Position Description (FD)**

1. Choose Federal Position Description in the Navigator.

## **Position Description Routing History (FD)**

1. Choose Position Description -> Reference button

## **Position Establish (FD)**

1. Choose Request for Personnel Action -> Federal Position -> Establish

## **Position Evaluation**

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Evaluation button.

## Position Hierarchy

1. Choose Work Structures -> Position -> Hierarchy in the Navigator.

## Position Hierarchy

1. Choose Work Structures -> Position -> Diagrammer in the Navigator.

## Position Occupancy Folder

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Query a position.
3. Choose the Occupancy button.

## Position Reporting To

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Reporting To button.

## Position Requirements

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Requirements button.

## Position Review (FD)

1. Choose Request for Personnel Action -> Federal Position -> Review

## Position Transaction

1. Choose Work Structures -> Position -> Position Transaction in the Navigator.

## Possible Certifications

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button.
3. Choose the Electable Choices button
4. Choose the Possible Certifications button

## Postal/Zip

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Postal/Zip in the Navigator.

## Previous Employment

1. Choose People -> Enter and Maintain in the navigator
2. Query a person.
3. Choose the Others button.
4. Select Previous Employment.

## Previous Services Validation pages (France)

1. Choose People -> Services Validation in the Navigator

## Primary Care Providers

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Person Primary Care Provider

Or:

1. Choose People -> Total Comp Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Care Providers button.

## Prior Employment SSP (SSP1L) (UK)

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the SSP1L button.

## Process Log

1. Choose Processes and Reports -> Process Log in the Navigator.

## Program/Plan Years

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Program/Plan Years in the Navigator.

## Programs

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.

## Program Enrollment Requirements

1. Choose Total Compensation -> General Definitions -> Programs and Plans -> Program Enrollment Requirements in the Navigator.

## **Program Participation Eligibility**

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.

## **Program Waive Certifications**

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.
6. Choose the Waive Certification button.

## **Program Waive Reasons**

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.

## **Promotion (FD)**

1. Choose Request for Personnel Action -> Salary Change -> Promotion

## **Provincial Employment Standard (CA)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. Position the cursor in the Organization Classifications Name field.
4. Select the Business Group from the List of Values.
5. Position the cursor in the field with the entry Business Group.
6. Choose the Others button.
7. Select Provincial Employment Standard and click OK.
8. Double-click in the FlexField to display the window.

## **Provincial Reporting Info. (CA)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.

3. Position the cursor in the Organization Classifications Name field.
4. Select GRE/Legal Entity from the List of Values.
5. Position the cursor in the field with the entry GRE/Legal Entity.
6. Choose the Others button.
7. Select Provincial Reporting Info and click OK.
8. Double-click in the FlexField to display the window.

## **Provincial Tax Information <Employee> (CA)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Select the Provincial Tax Information region.

Or:

1. Choose People -> Fastpath -> Tax Sign-up in the Navigator.
2. In the resulting Find window, query an employee.
3. Select the Provincial Tax Information region.

## **Qualification Competencies**

1. Choose Career Management -> Qualification Types in the Navigator.
2. Enter or select a Qualifications Framework qualification.
3. Choose the Competencies button.

## **Qualification Types**

1. Choose Career Management -> Qualification Types in the Navigator.

## **Qualifications**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Qualifications.

Or:

1. Choose Fastpath -> Qualifications in the Navigator.

## **Quality Increase (FD)**

1. Choose Request for Personnel Action -> Salary Change -> Quality Increase

## QuickPaint Inquiry

1. Choose Processes and Reports -> Run a QuickPaint Report in the Navigator.
2. Query a report that has been run.
3. Choose the View Report button.

## QuickPay (Payroll)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select QuickPay.

Or:

1. Choose Fastpath -> QuickPay in the Navigator.
2. In the resulting Find window, query the person.

## Rating Scales

1. Choose Career Management -> Rating Scales in the Navigator.

## Realignment (FD)

1. Choose Request for Personnel Action -> Realignment

## Reassignment (FD)

1. Choose Request for Personnel Action -> Reassignment

## Record Continuing Benefits Payment

1. Choose People -> Total Comp Contribution -> Record Continuing Benefits Payments in the Navigator.

## Record Layout Advanced Conditions (US, UK)

1. Choose Benefits Extract -> Layout Definition in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.
3. Select a Data Element and choose the Advanced Conditions button.

## Record Layout Include Conditions

1. Choose Mass Information eXchange -> System Extract -> Layout Definition in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.

3. Select a Data Element and choose the Include Conditions button.

## **Recruit / Fill (FD)**

1. Choose Request for Personnel Action -> Recruit / Fill

## **Recruiting For**

1. Choose Recruitment -> Recruitment Activity in the Navigator.
2. Enter or query a recruitment activity.
3. Choose the Recruiting For button.

## **Recruitment Activity**

1. Choose Recruitment -> Recruitment Activity in the Navigator.

## **Reduction in Force Retention Register (FD)**

1. Choose Reduction in Force (RIF).

## **Registered Employer Information (NZ)**

1. Choose Work Structures -> Organization -> Hierarchy.
2. Enter or query an organization.
3. Select GRE/Legal Entity in the Organization Classification region.
4. Choose Others -> Registered Employer.

## **Regulations**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Regulations in the Navigator.

## **Regulatory Bodies and Regulations**

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Reporting Groups in the Navigator.
2. Query or enter a reporting group.
3. Choose the Plan Regulatory Bodies and Regulations button.

## **Reimbursements Requests (Advanced Benefits)**

1. Choose People -> Total Comp Distribution -> Reimbursements Requests in the Navigator.

## Related Person Changes

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Related Person Changes button.
4. Choose the Define Related Person Change button.

## Related Person Changes Cause Life Events (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Related Person Changes button.

## Remark Codes and Descriptions (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Remark Codes and Descriptions.

## Reporting Categories (CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Categories.

## Reporting Groups

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Reporting Groups in the Navigator.

## Reporting Statutes (CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Statutes.

## Representative Body

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a representative body.
3. Choose the Others button and select Representative Body.

## Representative Body (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.



2. Enter or query a representative body.
3. Choose the Others button and select Representative Body.

## **Request for Personnel Action (FD)**

1. Choose Request for Personnel Action

## **Request Letter**

1. Choose Recruitment -> Request Recruitment Letter in the Navigator.

## **Request Set**

1. Choose Security -> Report Sets in the Navigator.

## **Requisition and Vacancy**

1. Choose Recruitment -> Requisition and Vacancy in the Navigator.

## **Restricted Form Process Methods (FD)**

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Short Form / Restricted Data.

## **RetroPay Set (Payroll)**

1. Choose Payroll -> RetroPay Set in the Navigator.

## **RetroPay Status (Payroll)**

1. Choose View -> RetroPay Status in the Navigator.

## **Return to Duty (FD)**

1. Choose Request for Personnel Action -> Return to Duty

## **Reverse Payroll Run (Payroll)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Reverse Run.

Or:

1. Choose Fastpath -> Reverse Payroll Run in the Navigator.
2. In the resulting Find window, query the person.

## **RIF Exception (FD)**

1. Choose Request for Personnel Action -> RIF Exception.

## **Robien Rebate (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Robien Rebate.

## **Roles**

1. Choose Transaction Maintenance Forms -> Roles in the Navigator.

## **Routing**

1. Choose Work Structures -> Position -> Position Transaction in the Navigator.
2. Choose Save from the File menu.

Or:

1. Choose Work Structures -> Budget -> Budget Worksheet in the Navigator.
2. Choose Save from the File menu.
3. Choose Save from the File menu.

## **Routing Group and Groupbox Details (FD)**

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Routing Groups and Groupboxes.

## **Routing Group and Routing List Details (FD)**

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Routing Lists.

## **Routing History (FD)**

1. Choose Worklist
2. Select a Notification and open it
3. Click Routing History

## **Routing Lists**

1. Choose Transaction Maintenance Forms -> Routing Lists in the Navigator.

## **Rows**

1. Choose Other Definitions -> Table Structure in the Navigator.
2. Enter or query a table.

3. Choose the Rows button.

## Run QuickPaint Report

1. Choose Processes and Reports -> Run a QuickPaint Report in the Navigator.

## Salary

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Salary button.

Or:

1. Choose Fastpath -> Salary in the Navigator.
2. In the resulting Find window, query the person.

## Salary Basis

1. Choose Total Compensation -> Basic -> Salary Basis in the Navigator.

## Salary History

Do one of the following:

1. Choose View -> Histories -> Salary in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Salary History button.

Or:

1. Choose Fastpath -> Salary History in the Navigator.
2. In the resulting Find window, query the person.

## Salary Management Folder

1. Choose People -> Salary Management in the Navigator.

## Salary Tax Info (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.

## Savings Plan

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Savings Plan in the Navigator.

## Savings Plan (UK)

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Savings Plan in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.
3. Select a Data Element and choose the Include Conditions button.

## Scale Rate

1. Choose Work Structures -> Grade -> Point Values in the Navigator.

## Schedules (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.
2. Enter or query a pattern.
3. Choose the Calendars button.
4. Choose the Schedules button.

## Schools and Colleges

1. Choose Career Management -> Schools and Colleges in the Navigator.

## Schools and Colleges Attended

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Schools/Colleges.

## Secondary Statuses

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant or employee.
3. Do one of the following:

For an applicant:

- Choose the Others button and select Application.
- Choose the Secondary Status button.

For an employee:

- Choose the Assignment button.
- Choose the Others button and select Secondary Status.

Or:

1. Choose Fastpath -> Secondary Status in the Navigator.

2. In the resulting Find window, query the person.

## **Security Groups (UK)**

1. Choose Security -> Security Groups in the Navigator.

## **Security Profile**

1. Choose Security -> Profile in the Navigator.

## **Seniority pages (France)**

1. Choose Other Definitions -> Seniority in the Navigator

## **Separation (FD)**

1. Choose Request for Personnel Action -> Separation

## **Service Areas**

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Service Areas in the Navigator.

## **Set of Books**

1. Choose Customer and Supplier Maintenance -> Set of Books in the Navigator.

## **Sickness Control Rules (UK)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group
3. Choose the Others button and select Sickness Control Rules.

## **Sickness Evidence (UK)**

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.
4. Enter or query a sickness absence.
5. Choose the Evidence button.

## **Sickness Pay (UK)**

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.

4. Enter or query a sickness absence.
5. Choose the SSP/SMP button.

## **Social Insurance Information (Germany)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Social Insurance Information button.

## **Social Security Information (Spain)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Social Security Information button.

Or:

1. Choose Fastpath -> Social Security Information in the Navigator.
2. In the resulting Find window, query the person.

## **Social Security Rebate (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Social Security Rebate.

## **Sort**

1. Choose Mass Information eXchange -> System Extract -> Layout Definition in the Navigator.
2. Choose the File Layout tab and select a Record Name.
3. Choose the Sort button.

## **Special Information**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Special Info button.

Or:

1. Choose Fastpath -> Special Information in the Navigator.
2. In the resulting Find window, query the person.

## Special Information Types

1. Choose Other Definitions -> Special Information Types in the Navigator.

## Special Rates

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Special Rates button.

## SQWL Employer Rules (1) (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Employer Rules (1)

## SQWL Employer Rules (2) (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Employer Rules (2)

## SQWL Generic Transmitter Rules (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Generic Transmitter Rules

## SQWL State-Specific Transmitter Rules (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL State Transmitter Rules

## Standard Distributions/Contributions (US)

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Standard Distributions/Contributions in the Navigator.

## Standard Holiday Absences <Employee> (CA)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.

3. Choose the Others button.
4. Select Standard Holiday Absences.

Or:

1. Choose People -> Fastpath -> Statutory Holidays in the Navigator.
2. In the resulting Find window, query an employee.

## Standard Rates

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Standard Rates in the Navigator.

## Standard Holiday Absences (FR)

1. Choose FastPath -> Standard Holiday Absences

## State Tax Rules (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select State Tax Rules.

## State Tax Rules <Employee> (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.

## Statement of Earnings (Payroll) (US)

Do one of the following:

1. Choose View -> Assignment Process Results
2. Choose the SOE Report button.

Or:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Statement of Earnings.

Or:

1. Choose Fastpath -> US Statement of Earnings in the Navigator.
2. In the resulting Find window, query the person.



## **Statement of Earnings (AU)**

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> Statement of Earnings.

Or:

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> QuickPay.
4. Choose View Results -> Statement of Earnings.

Or:

1. Choose FastPath -> Statement of Earnings.
2. Enter employee details.

## **Statement of Earnings (New Zealand) (NZ)**

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> Statement of Earnings.

Or:

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> QuickPay.
4. Choose View Results -> Statement of Earnings.

Or:

1. Choose FastPath -> Statement of Earnings.
2. Enter employee details.

## **Statutory Holiday Absences**

1. Choose FastPath -> Statutory Holiday Absences in the Navigator

## **Statutory Situations**

1. Choose Work Structures -> Statutory Situations in the Navigator.

## **Step Adjustment (FD)**

1. Choose Request for Personnel Action -> Salary Change -> Step Adjustment

## **Step Increase with Pay (FD)**

1. Choose Request for Personnel Action -> Salary Change -> Step Increase with Pay

## **Submit a New Request**

1. Choose Processes and Reports -> Submit Processes and Reports in the Navigator.
2. Select Single Request or a Request Set.

## **Superannuation Fund Information (AU)**

1. Choose Work Structures -> Organization -> Description.
2. Enter or query an organization.
3. Select Payee Organization and choose the Others button.
4. Click in the blank field.

## **Supplementary Roles**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select Supplementary Roles.

## **Supplier**

1. Choose Customer and Supplier Maintenance -> Supplier in the Navigator.

## **System Options**

1. Choose Customer and Supplier Maintenance -> System Options in the Navigator.

## **Table Event Updates (UK)**

1. Choose Other Definitions -> Table Event Updates in the Navigator.

## **Table Structure**

1. Choose Other Definitions -> Table Structure in the Navigator.

## **Table Values**

1. Choose Other Definitions -> Table Values in the Navigator.

## **Taxability Rules**

1. Choose Total Compensation -> Basic -> Tax Withholding Rules in the Navigator.

## **Taxation Information (New Zealand) (NZ)**

1. Choose People -> Enter and Maintain.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.
5. Select PAYE Information in the Element Name column.
6. Click on the Entry Values button.

## **Tax Information (Germany)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Tax Information button.

## **Tax Information (Ireland)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Tax Information button.

## **Tax Information (Spain)**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Tax Information button.

Or:

1. Choose Fastpath -> Tax Information in the Navigator.
2. In the resulting Find window, query the person.

## **Terminate**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.

## **Terminate Applicant**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.

3. Choose the Others button and select End Application.

Or:

1. Choose Fastpath -> End Application in the Navigator.
2. In the resulting Find window, query the person.

## **Termination of Grade Retention (FD)**

1. Choose Request for Personnel Action -> Salary Change -> Termination of Grade Retention

## **Termination of Interim WGI (FD)**

1. Choose Request for Personnel Action -> Salary Change -> Termination of Interim WGI

## **Termination Payments (AU)**

1. Choose FastPath -> Termination Payments.

## **Training Provider Inf (South Africa))**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Training Provider.
4. Choose the Others button and enter training provider information.

## **Transaction Categories**

1. Choose Transaction Maintenance Forms -> Transaction Categories in the Navigator.

## **Transaction Category Wizard**

1. Choose Maintenance Forms -> Transaction Category Wizard.

## **Transaction Status**

1. Choose Security -> Transaction Status in the Navigator

## **Transaction Templates**

1. Choose Transaction Maintenance Forms -> Transaction Templates in the Navigator.

## **Transport Tax Info (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.

3. Choose the Others button and select Transport Tax Info.

## **Unions Processing**

1. Choose Total Compensation -> Basic -> Union Element Creation Template.

## **Update Payroll Run (Payroll)**

1. Choose Payroll -> Update Payroll Run in the Navigator.

## **URSSAF Center Information (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a URSSAF Center.
3. Choose the Others button and select URSSAF Center Information.

## **URSSAF Information (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select URSSAF.

## **User Defined Eligibility Criteria**

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Participation Eligibility Profiles, or
2. Choose Work Structures -> Collective Agreements -> Define Eligibility Profiles in the Navigator.
3. Click User Defined Eligibility Criteria.

## **User Types and Statuses**

1. Choose Other Definitions -> User Types and Statuses

## **Valid Grades (for jobs)**

1. Choose Work Structures in the Navigator.
2. Choose either Job -> Description or Position -> Description.
3. Enter or query a job or position.
4. Choose the Valid Grades button.

## **Valid Payment Methods**

1. Choose Payroll -> Description in the Navigator.
2. Enter or query a payroll.

3. Choose the Valid Payment Methods button.

## **Variable Rate Profiles**

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Variable Rate Profiles in the Navigator.

## **VETS-100 Filing (US)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select VETS-100 Filing.

## **Vehicle Data Entry (UK)**

1. Choose Total Compensation -> Basic -> Vehicle Data Entry in the Navigator.

## **Vehicle Repository**

1. Choose Total Compensation -> Basic -> Vehicle Repository in the Navigator.

## **View Absence History**

1. Choose View -> Histories -> Absence in the Navigator.

## **View Earnings and Deductions Balances (US, CA)**

Do one of the following:

1. Choose View -> Employee Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath -> Employee Balances in the Navigator.
2. In the resulting Find window, query the person.

## **View Element Entry History for Employee**

1. Choose View -> Histories -> Entries in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Entry History button.

## **View Employee Dental, Medical and Vision Benefits (US)**

1. Choose View -> Employee Benefits in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the View Benefits button.

## **View Employee Grade Comparatio**

1. Choose View -> Grade Comparatio in the Navigator.

## **View Enrollment Results**

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment Enrollment -> View Enrollment Results in the Navigator.

## **View Participation Information (Advanced Benefits)**

1. Choose People -> Total Comp Participation -> View Participation Information in the Navigator.

## **View Program Structure**

1. Choose Total Compensation -> Programs and Plans -> View Program Structure in the Navigator.

## **View Run Messages (Payroll)**

1. Choose View -> System Messages in the Navigator.

## **View Tax Balances (US, CA)**

Do one of the following:

1. Choose View -> Tax Information -> Tax Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath -> Tax Balances in the Navigator.
2. In the resulting Find window, query the person.

## **View Vacancies**

1. Choose View -> Vacancies in the Navigator.

## **Visa Data Template**

1. Choose People -> Maintain Using Templates -> Maintain Visa Information

## **W2 Reporting Rules (US)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select W2 Reporting Rules.

## **W941 (Payroll) (US)**

1. Choose View -> Tax Information-> Form 941 Information in the Navigator

## **Wage Attachment Earnings Rules (US)**

1. Choose Total Compensation -> Wage Attachment -> Earnings Rules in the Navigator.

## **Wage Attachment Exemption Rules (US)**

1. Choose Total Compensation -> Wage Attachment -> Exemption Rules in the Navigator.

## **Wage Attachment Fee Rules (US)**

1. Choose Total Compensation -> Wage Attachment -> Fee Rules in the Navigator.

## **Wage Attachment Limit Rules (US)**

1. Choose Total Compensation -> Wage Attachment -> Limit Rules in the Navigator.

## **Waive Participation (Advanced Benefits)**

1. Choose People -> Total Comp Participation -> Waive Participation in the Navigator.

## **Waiving**

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Waiving button.

## **WC Codes and Rates (US)**

1. Choose Work Structures -> Job -> Workers Compensation Rates in the Navigator

## **Welfare Tax Info (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Welfare Tax Info.

## **What-if Eligibility (Advanced Benefits)**

1. Choose People -> Total Comp Participation -> What-if Eligibility in the Navigator.

## **Work Accident Info (France)**

1. Choose Work Structures -> Organization -> Description in the Navigator.



2. Enter or query an Establishment.
3. Choose the Others button and select Work Accident Info.

## **Work Choices (Job and Position)**

1. Choose Work Structures -> Job or Position -> Description in the Navigator.
2. Enter or query a job or position.
3. Choose the Work Choices button.

## **Work Choices (Person)**

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Work Choices.

## **Work Day Information**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Work Day Information.

## **Work Incident**

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Work Incidents.

Or:

1. Choose Fastpath -> Work Incidents in the Navigator.
2. In the resulting Find window, query the person.

## **Work Schedule (US, CA)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Work Schedule.

## **Work Site Filing (US)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Work Site Filing.

## **Worker's Compensation (US)**

1. Choose Work Structures -> Job -> Workers Compensation Codes in the Navigator

## **Worksheet**

1. Choose Work Structures ->Budget ->Worksheet in the Navigator.
2. Define the properties of the worksheet.
3. Choose the Create Worksheet button.

## **Worksheet Characteristics**

1. Choose Work Structures ->Budget ->Worksheet in the Navigator.

## **ZA ACB Installation Information (South Africa)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Business Group.
4. Choose the Others button and select ZA ACB Installation Information.

## **ZA NQF SETA Information (South Africa)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select HR Organization.
4. Choose the Others button and select ZA NQF SETA Information.

## **ZA Payslip Balances (South Africa)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Business Group.
4. Choose the Others button and select ZA Payslip Balances.

## **ZA Payslip Elements (South Africa)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Business Group.
4. Choose the Others button and select ZA Payslip Elements.

## **ZA Tax File Creator Information (South Africa)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Business Group.
4. Choose the Others button and select ZA Tax File Creator Info.

## **ZA Tax Information (South Africa)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select GRE/Legal Entity.
4. Choose the Others button and select ZA Tax Information.

## **ZA UIF File Creator Information (South Africa)**

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Business Group.
4. Choose the Others button and select ZA UIF File Creator Information.



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## Reports and Processes in Oracle HRMS

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

The reports are divided into functional areas, as follows:

- Organization Structures, page B-2
- Jobs and Positions, page B-2
- People Budgets and Costing, page B-4
- Employment Agreements and Legal Compliance, page B-6
- Recruiting and Hiring, page B-11
- People Management, page B-22
- Talent Management, page B-43
- Learning Management, page B-45
- General Compensation Structures, page B-50
- Salary, Grades, and Pay Administration, page B-50
- Compensation and Awards Management, page B-57
- Leave and Absence Management, page B-59
- Health and Welfare Management, page B-62
- Other Payroll Earnings and Deductions, page B-63
- Payrolls, page B-63
- Payroll Payment and Distributions, page B-64
- Payroll Statutory Deductions and Reporting, page B-66
- Payroll Processing and Analysis, page B-74
- Payroll Event Rules, page B-85
- Deploy Self Service Capability, page B-85
- Workforce Intelligence, page B-85

This is followed by the list of processes, page B-85.

# Reports

## Organization Structures

### Location Occupancy Report (FD)

Lists all employees that currently or have at one time occupied a Location from the date you specify to the date the report is run

### Organization Hierarchy Report

The organizations and optionally their managers below a selected position in a particular hierarchy.

### Organization Workforce Report (HRMSi)

This report investigates the performance of your organizations as measured by the increase and decrease in workforce over a selected time period. Click on the organization name in the table to investigate the workforce changes for a particular organization, using the Workforce Summary Analysis report.

## Jobs and Positions

### Employee Job and Position Detail - Employee Work Choices by Job

This worksheet enables you to analyze deployment factors for jobs, people in specific jobs, and job applicants.

### Employee Job and Position Detail - Employee Work Choices by Position

This worksheet enables you to analyze deployment factors for positions, people in specific positions, and position applicants.

### Employee Job and Position Detail - Employee by Job and Position

This worksheet enables you to analyze assignment details for employees within an organization by job and position.

### Job and Position Special Information Detail - Job and Position Special Information

This worksheet enables you to analyze special information types associated with jobs and positions.

### Job and Position Skills Matching Report

Lists of employees, applicants or both that meet some or all skill requirements of a job or position.

### Mass Realignment Deselection (Federal)

Lists employees deselected for realignment

### Mass Realignment PA Listing for All (Federal)

Notification of Personnel Action in list form for employees selected for a realignment.

**Mass Realignment PA Listing for Employee (Federal)**

Notification of Personnel Action in list form for an individual employee selected for a realignment.

**Mass Realignment Preview (Federal)**

Lists employees selected for a realignment

**Mass Transfer In Deselection (Federal)**

Lists employees deselected for a Transfer In action

**Mass Transfer In PA Listing for All (Federal)**

Notification of Personnel Action in list form for employees selected for a Transfer In action

**Mass Transfer In PA List for Employee (Federal)**

Notification of Personnel Action in list form for an individual employee selected for a Transfer In action

**Mass Transfer In Preview (Federal)**

Lists employees selected for a Transfer In action

**Mass Transfer Out Deselection (Federal)**

Lists employees deselected for a Transfer Out action

**Mass Transfer Out PA Listing for All (Federal)**

Notification of Personnel Action in list form for employees selected for a Transfer Out action

**Mass Transfer Out PA List for Employee (Federal)**

Notification of Personnel Action in list form for an individual employee selected for a Transfer Out action

**Mass Transfer Out Preview (Federal)**

Lists employees selected for a Transfer Out action

**NFC JCL Outbound Interface (Federal)**

Job Control Language file identifies the origin and destination of the NFC FESI transmission files, such as the routing information and the user ID required for the authentication of the information.

**NFC Position Outbound Interface (Federal)**

Generates extract files that conform to NFC's interface requirements. Each file consists of a header, Job Control Language file, and detail records (snapshots of the position records for the date range specified).

### **Organization Separation Report (HRMSi)**

This report investigates the performance of your best and worst organizations based on the workforce separation. This can be an absolute figure or a percentage of the workforce for the organization. If you click on the organization name in the table you can investigate the workforce changes for an organization.

### **Position Description (Federal)**

Lists the details of an approved position classification

### **Position Hierarchy Report**

The positions and optionally their holders below a selected position in a particular hierarchy.

### **Pre Hire Report (Payroll) (France)**

This report has to be delivered to an establishment's local URSSAF center when a person is about to become a new employee in that establishment.

### **Reduction in Force Retention Register (Federal)**

Lists eligible employees based on Tenure Group, Tenure Subgroup, Service Computation Date (SCD RIF), Performance Score, and Adjusted SCD.

### **Re-integration Actions Report (Netherlands)**

Lists all re-integration actions for employees.

### **Synchronize NFC Outbound Interface Errors (Federal)**

Identifies the error statuses in the position and personnel action outbound interface extract records and automatically retransmits these records with the next scheduled transmission

## **People Budgets and Costing**

### **Budget Period Position Detail Report**

Lists the status of all Positions that are part of a specific Budget.

### **Costing Detail Report**

The Costing Detail report provides pertinent costing allocation details at the element and employee level.

### **Employee Budget (Non Positional Control) Status - by Grade (HRMSi)**

This report investigates the difference between budgeted and actual workforce for different grades in your enterprise.

### **Employee Budget (Non Positional Control) Status - by Job (HRMSi)**

This report investigates the difference between budgeted and actual workforce for different jobs for your enterprise.



**Employee Budget (Non Positional Control) Status - by Organization (HRMSi)**

This report investigates the difference between budgeted and actual workforce for your enterprise.

**Employee Budget (Non Positional Control) Status - by Position (HRMSi)**

This report investigates the difference between budgeted and actual workforce for different positions for your enterprise.

**Employee Budget Trend - by Grade (HRMSi)**

This report investigates the difference between budgeted and actual workforce for different grades in your enterprise.

**Employee Budget Trend - by Job (HRMSi)**

This report investigates the difference between budgeted and actual workforce for different jobs for your enterprise.

**Employee Budget Trend - by Organization (HRMSi)**

This report investigates the difference between budgeted and actual workforce for your enterprise.

**Employee Budget Trend - by Position (HRMSi)**

This report investigates the difference between budgeted and actual workforce for different positions for your enterprise.

**Entity Element Summary**

Use this report if you administer position control budgets. The report lists the budget status for a pay element and entity for a specified time interval.

**Headcount Budget Trend (HRMSi, DBI)**

This report shows changes in actual and budgeted employee headcount over time for the selected manager.

**Organization Budget (Non-Position Control) Report (HRMSi)**

This report investigates the performance of your best and worst organizations. Performance can be measured by a variety of indicators, but for this report, performance is judged by the variance between the budgeted and actual workforce in each organization. Top organizations are those with the largest variance. Bottom organizations are those with the least variance.

**Note:** Non-Position Control reports are based on the budget scheme in use prior to 11i.PER.G mini-pack.

**Organization Budget (Position Control) Report (HRMSi)**

This report investigates the performance of your best and worst organizations. Performance can be measured by a variety of indicators, but for this report, performance is judged by the variance between the budgeted and actual workforce in each organization. Top organizations are those with the largest variance. Bottom organizations are those with the least variance.

**Note:** Position Control reports are based on the budget scheme in use since the 11i.PER.G mini-pack.

### **Organizational Position Summary Report**

Lists the budget status for all positions within a Position Control Organization.

### **Position Element Detail Report**

Lists the budget status for all budgeted elements for a specific Position and Organization.

### **Position Element Summary Report**

Lists the budget status for an element for all positions in the Business Group.

### **Position Summary Report**

Lists the budget status of all Positions in a specific Organization.

### **Report Under Budgeted Entities**

Run this report if you administer position control budgets. The report lists the positions that are under budgeted for the selected organization and all subordinate organizations in the organization hierarchy.

### **Report Under Budgeted Positions (Salary)**

HRMS still supports this report, run in previous versions for administering position control budgets. The report lists the positions that are under budgeted for the organization you select, and all subordinate organizations in the organization hierarchy. Oracle recommends you use Report Under Budgeted Entities, which adds the ability to report on organizations, jobs, and grades, as well as positions.

### **Staffing Budget Details Report**

Compares actual staffing level with budgeted levels over a specified period.

### **Workforce Budget (Non-Position Control) Report (HRMSi)**

This report compares the amount of workforce you have budgeted for against the amount of workforce that actually exists. The report enables you to review all the organizations within a budget. You can select the time period you want to analyze.

### **Workforce Budget (Position Control) Report (HRMSi)**

This report compares the amount of workforce you have budgeted for against the amount of workforce that actually exists. The report enables you to review all the organizations within a budget. You can select the time period you want to analyze.

## **Employment Agreements and Legal Compliance**

### **AA/EEO Breakdown Report (Federal)**

Government required ethnicity and gender breakdown report by Occupational Category or Pay Plan

**AAP Reports (US)**

Provides Job group analysis and workflow analysis reports.

**ADA Reports (US)**

Shows how your enterprise is responding to the requests of employees with disabilities.

**Attestation ASSEDIC Report (Payroll) (France)**

A mandatory report given to an employee on leaving the company. It details specific information about their employment.

**Bilan Social Report (Payroll) (France)**

A statutory report that lists a large number of HR and Payroll related indicators in order to provide a summary of many aspects affecting a company or establishment's human resources in a year.

**Compliance (Person, United States Specific) Detail - Detailed Special Information (US)**

This Discoverer worksheet enables you to view special employee information for employees within your organization.

**Compliance (Person, United States Specific) Detail - Disabilities (US)**

This Discoverer worksheet enables you to view special information concerning employees with disabilities within your organization.

**Compliance (Person, United States Specific) Detail - Disability Accommodations (US)**

This Discoverer worksheet enables you to view details about accommodations made for employees with disabilities across your organization.

**Compliance (Person, United States Specific) Detail - OSHA Incidents (US)**

This Discoverer worksheet enables you to view details associated with recorded OSHA incidents within your organization.

**CPDF Dynamics Report (Federal)**

Record of the personnel data changes that occurred for the employee during a reporting period

**CPDF Dynamics Report Transmittal Form (Federal)**

Transmittal form that accompanies the CPDF Dynamics Report

**CPDF OCT Report Transmittal Form (Federal)**

Transmittal form that accompanies the Organization Component Tracking Report

**CPDF Organization Component Tracking Report (Federal)**

Record of the organizational codes, titles, and hierarchical relationships for organizations within an agency as of the last day of the quarterly reporting period

**CPDF Status Report (Federal)**

Record of each employee's personnel data as of the ending date of a fiscal quarter

**CPDF Status Report Transmittal Form (Federal)**

Transmittal form that accompanies the CPDF Status Report

**DIF Statement (Droit Individuel a la Formation) (France)**

The statement informs employees of their DIF training absence entitlement for the year.

**EHRI Status Report (Federal)**

Records each employee's personnel data for the calendar month

**EHRI Dynamics Report (Federal)**

Lists the employee personnel actions processed during a bi-weekly reporting period

**EEO Form 462 (Federal)**

Summarizes the details of each EEO complaint processed by your agency

**EEO-1 Reports (US)**

The Equal Employment Opportunity reports include the EEO Individual Establishment Report, the EEO Headquarters Report, the EEO Establishment Employment Listing, the EEO Consolidated Report, and the EEO-1 Exception Report.

**EE04 Reports (US)**

Run this report for state and local governments.

**EE05 Reports (US)**

Run this report for the school system or district.

**Electronic EEO-1 Report (US)**

Generates Equal Employment Opportunity (EEO) reports for your establishment hierarchy formatted for submission on magnetic media.

**Electronic EVS Report (US)**

Generates an Employee Verification Service (EVS) report formatted for submission to the SSA office on diskette. The report is a list of employees showing social security number, full name, gender, and date of birth. The SSA compares the report with its own records and reports mismatches to the submitter.

**Electronic VETS-100 Report (US)**

Shows number of special disabled and Vietnam era veterans you employ in each of nine job categories. Also, show total number of new hires in each job category and number of new hires in each category who qualify as Vietnam era veterans.

### **Employee Equal Opportunity by Job (Multiple Hierarchies, United States Specific) Comparison - by Establishment Hierarchy (HRMSi)**

The Establishment Hierarchy worksheet enables you to report on the number of employee primary assignments (male, female, total) for your reporting establishments by ethnic origin, location, and job name.

### **Employee Equal Opportunity by Job (Multiple Hierarchies, United States Specific) Comparison - by Organization Hierarchy (HRMSi)**

The Organization Hierarchy worksheet enables you to report on the number of employee primary assignments (male, female, total) for your reporting establishments by ethnic origin, organization and job name.

### **Employee Equal Opportunity Exceptions (United States Specific) Detail - Employees Outside Establishment Hierarchy (US)**

The Employees Outside an Establishment Hierarchy worksheet enables you to analyze which employees are at a location that is not in a defined Reporting Establishment Hierarchy, on a given effective date.

### **Employee Equal Opportunity Exceptions (United States Specific) Detail - Employees with Missing Equal Opportunity Data (US)**

This Discoverer worksheet enables your organization to discover which employee primary assignments have missing Ethnic Origin information on a given effective date. For example, the report will show if an employee is missing data for employment category or ethnic origin.

### **Employee Equal Opportunity Exceptions (United States Specific) Detail - Employees Without a Location (US)**

The Employees Without a Location Worksheet enables you to analyze which employee primary assignments are not assigned a location on a given effective date.

### **Employee Equal Opportunity for New Hires (Multiple Hierarchies, United States Specific) Detail - by Establishment Hierarchy (US)**

This Discoverer worksheet enables you to list employee new hires within a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Ethnic Origin, Hire Date, Age at Hire, Date Hired, Annual Salary, and Current Annual Salary. The list of employees is for a given establishment hierarchy.

### **Employee Equal Opportunity for New Hires (Multiple Hierarchies, United States Specific) Detail - by Organization Hierarchy (US)**

This Discoverer worksheet enables you to list employee new hires within a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Ethnic Origin, Hire Date, Age at Hire Date, Hired Annual Salary, and Current Annual Salary. The list of employees is for a given organization hierarchy.

### **Employee Equal Opportunity for Separations (Multiple Hierarchies, United States Specific) Detail - by Establishment Hierarchy (US)**

The Establishment Hierarchy workbook enables you to report on employee separations for a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Gender, Hire Date, Actual Separation Date, and Separation Reason. The worksheet shows a list of employees for a given establishment hierarchy.

### **Employee Equal Opportunity for Separations (Multiple Hierarchies, United States Specific) Detail - by Organization (US)**

This workbook enables you to report on employee separations within a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Gender, Hire Date, Actual Separation Date, and Separation Reason. The worksheet shows a list of employees for a given Organization Hierarchy.

### **Employee Equal Opportunity with Salary (Multiple Hierarchies, United States Specific) Detail - by Establishment Hierarchy (US)**

This Discoverer worksheet enables your organization to list employee primary assignment details including, Job Name, Employee Number, Gender, Ethnic Origin, Hire date and Salary. The list of employees is for a given Establishment Hierarchy.

### **Employee Equal Opportunity with Salary (Multiple Hierarchies, United States Specific) Detail - by Organization Hierarchy (US)**

This Discoverer worksheet enables your organization to list employee primary assignment details including, Job Name, Employee Number, Gender, Ethnic Origin, Hire date and Salary. The list of employees is for a given Organization Hierarchy.

### **EO Survey Report (US)**

Generates an Equal Opportunity (EO) Survey report for the specified reporting period and establishment hierarchy. The report shows, for full-time positions, numbers of applicants, hires, promotions, terminations, and employees. The report also shows annual monetary compensation and tenure data for full-time employees at the end of the reporting period.

### **French D2 Report (Declaration Annuelle Obligatoire D'emploi des Travailleurs Handicapes, de Mutiles de Guerre et Assimiles) (Payroll) (France)**

A mandatory report that all establishments with more than 20 employee's must submit each year. It contains details about the number of people employed by the establishment who are disabled.

### **IPEDS Reports (Payroll) (US)**

The Integrated Post-secondary Education Data System (IPEDS) reports are submitted to the National Center for Educational Statistics (NCES). The type of institution determines which reports you must run.

### **Mouvements de Main d'Oeuvre Report (Payroll) (France)**

A mandatory report that must be produced by each establishment every month. It lists the people that have joined or left the establishment during that time.

**OSHA Reports (US)**

Report on work related injuries or illness.

**Saudi Disabled Employee Report (Saudi Arabia)**

The Saudi Disabled Employee Report creates a list of all the disabled employees in your organization.

**SF-113A Federal Civilian Employment Report (Federal)**

Summary of federal civilian employment, payroll, and turnover

**Social Security Affiliation Magnetic (DISPMAG) (HR) (Mexico)**

Generates the DISPMAG02 and DISPMAG08 reports for submission to the Social Security agencies. This is in support of the Mexican Social Security agencies requirement to deliver employee status changes on a timely basis.

**Social Security Affiliation Salary Modification Report (HR) (Mexico)**

Generates the DISPMAG07 for submission to the Social Security agencies. This is in support of the Mexican Social Security agencies requirement to deliver employee status changes on a timely basis.

**SUA Interface Extract (HR) (Mexico)**

The SUA Interface Extract report generates the files for importing into SUA.

**VETS-100 Reports (US)**

Shows number of special disabled and Vietnam era veterans you employ in each of nine job categories. Also, show total number of new hires in each job category and number of new hires in each category who qualify as Vietnam era veterans.

**Work Incidents Report (Germany)**

The Work Incidents Report enables you to print out a formatted copy of the information entered in the Work Incidents window.

**Recruiting and Hiring****Applicant Detail - Address (iRecruitment)**

The Address Worksheet enables you to report on the addresses of your job applicants.

**Applicant Detail - by Grade (iRecruitment)**

The By Grade Worksheet enables you to report on the applicants who have applied to a specific grade. Grade Name is a page item on this worksheet so you can group your results by the grades for which your applicants have applied.

**Applicant Detail - by Job (iRecruitment)**

The By Job Worksheet enables you to report on the applicants that have applied for a specific job. Job Name is a page item on this worksheet so you can group your results by the jobs for which your applicants have applied.

**Applicant Detail - by Location (iRecruitment)**

The By Location Worksheet enables you to report on the applicants who have applied to a specific location. Location Name is a page item on this worksheet so you can group your results by the locations to which applicants have applied.

**Applicant Detail - by Organization (iRecruitment)**

The By Organization Worksheet enables you to report on the applicants who have applied to a specific organization. Organization Name is a page item on this worksheet so you can group your results by organization.

**Applicant Detail - by Position (iRecruitment)**

The By Position Worksheet enables you to report on the applicants who have applied for a specific position. Position Name is a page item on this worksheet so you can group your results by the positions for which your applicants have applied.

**Applicant Detail - by Source Type (iRecruitment)**

The By Source Type Worksheet enables you to report where applicants have indicated they saw the advertisement for your job. Source Type is a page item on this worksheet so you can group your results by the source type the applicant indicated.

**Applicant Detail - by Vacancy (iRecruitment)**

The By Vacancy worksheet enables you to report the applicants who have applied for a particular vacancy as of the date you select as your effective date. Vacancy Name is a page item on this worksheet so you can group your results by the vacancy for which the applicant has applied.

**Applicant Detail - Competence (iRecruitment)**

The Competence Worksheet enables you to report on the competencies your applicants have indicated they possess. Competencies are entered by your applicants as 'skills' as part of their account.

**Applicant Detail - Detail (iRecruitment)**

The Detail worksheet enables you to report on the details of your applicants based on the parameters you set for the report.

**Applicant Detail - Phone (iRecruitment)**

The Phone Worksheet enables you to report on the phone numbers of your job applicants.

**Applicant Detail - Qualification (iRecruitment)**

The Qualification Worksheet enables you to report on the qualifications your applicants have.

**Applicant Detail - School College Attendance (iRecruitment)**

The School College Attendance Worksheet enables you to report on the schools and colleges your job applicants have attended.



**Applicant Efficiency (Hires - Manager Hierarchy) PMV report (iRecruitment)**

This PMV report measures the average amount of time it takes to fill a vacancy, and also the average time from filling the vacancy to the employee starting, for employees starting in the selected reporting period, for hires within a hiring manager hierarchy.

**Applicant Efficiency (Hires - Organization Hierarchy) PMV report (iRecruitment)**

This PMV report measures the average amount of time it takes to fill a vacancy, and also the average time from filling the vacancy to the employee starting, for employees starting in the selected reporting period, for hires within an organization hierarchy.

**Applicant Fill to Start (Hires - Manager Hierarchy) PMV report (iRecruitment)**

This PMV report measures the days between the date that the vacancy was filled and the date on which the successful applicant becomes an employee for employees starting in the reporting period, for hires within a hiring manager hierarchy.

**Applicant Fill to Start (Hires - Organization Hierarchy) PMV report (iRecruitment)**

This PMV report measures the days between the date that the vacancy was filled and the date on which the successful applicant becomes an employee for employees starting in the reporting period, for hires within an organization hierarchy.

**Applicant Time to Fill (Manager Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the number of days between the start date of the vacancy and the date upon which the vacancy is filled for employees starting in the reporting period for vacancies that are filled in the reporting period, within a hiring manager hierarchy.

**Applicant Time to Fill (Organization Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the number of days between the start date of the vacancy and the date upon which the vacancy is filled for employees starting in the reporting period for vacancies that are filled in the reporting period, within an organization hierarchy.

**Applicant Time to Start (Manager Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for employees starting in the reporting period, within a hiring manager hierarchy.

**Applicant Time to Start (Organization Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for employees starting in the reporting period, within an organization hierarchy.

**Applicant Time to Start Comparison - by Ethnic Origin (United States Specific) (HRMSi) (US)**

This worksheet analyses the days required to fill vacancies within a recruitment activity for ethnic groups in the United States.

**Applicant Time to Start Comparison - by Ethnic Origin (United Kingdom Specific) (HRMSi) (UK)**

This worksheet analyses the days required to fill vacancies within a recruitment activity for ethnic groups in the United Kingdom.

**Applicant Time to Start Comparison - by Gender (HRMSi)**

This worksheet analyses the days required to fill vacancies within a recruitment activity by gender.

**Applicant Time to Start Comparison - by Grade (HRMSi)**

This worksheet analyses the days required to fill vacancies within a recruitment activity by grade.

**Applicant Time to Start Comparison - by Job (HRMSi)**

This worksheet analyses the days required to fill vacancies within a recruitment activity by job.

**Applicant Time to Start Comparison - by Location (HRMSi)**

This worksheet analyses the days required to fill vacancies within a recruitment activity by location.

**Applicant Time to Start Comparison - by Organization (HRMSi)**

This worksheet analyses the days required to fill vacancies within a recruitment activity by organization.

**Applicant Time to Start Comparison - by Vacancy (HRMSi)**

This worksheet analyses the days required to fill vacancies within a recruitment activity by vacancy.

**Application Status - Age Analysis (HRMSi)**

This worksheet enables you to investigate the current age of applicants for a particular vacancy.

**Application Status - Applicant Statuses (HRMSi)**

This worksheet enables you to investigate the applications that exist for a Business Group, requisition, and recruiter.

**Application Status - Recruitment Activity Summary (HRMSi)**

This worksheet enables you to investigate recruitment activities within your Business Group. You can analyze the current status of recruitment activities, for example, the number of new applicants, the number of offers made, and the number of terminated applicants. You can view recruitment activity information for a Business Group, requisition, vacancy, and recruitment type.

**Application Status - Vacancy Summary (HRMSi)**

This worksheet enables you to investigate vacancies within your Business Group. You can analyze the current status of vacancies, for example, the number of remaining applicants, the number of new applicants, and the number of terminated applicants. You can view vacancy information for a Business Group, recruitment type, and recruitment activity.

**Application Termination Detail - Termination Details**

This Worksheet investigates the reasons your enterprise has terminated applications.

**Application Termination Detail - Termination Reasons by Vacancy**

This Worksheet investigates the reasons why job applicants have terminated applications within your enterprise.

**Candidate Detail - Address (iRecruitment)**

The Address Worksheet enables you to report on the addresses of your candidates.

**Candidate Detail - Competency (Skill) (iRecruitment)**

The Competency (Skill) Worksheet enables you to report on the competencies of your candidates. It also includes their level of proficiency. Competencies are entered by your candidates as 'skills' as part of their account

**Candidate Detail - Education (iRecruitment)**

The Education Worksheet enables you to report on which schools and colleges your candidates have attended and the qualifications they have achieved.

**Candidate Detail - Employment History (iRecruitment)**

The Employment History Worksheet enables you to report on the previous and current employers of your candidates.

**Candidate Detail - Job Search Views (iRecruitment)**

The Job Search Views Worksheet enables you to report on the saved job searches your candidates have set up.

**Candidate Detail - Personal Detail (iRecruitment)**

The Personal Detail Worksheet enables you to report on the details that your candidates have entered as part of their iRecruitment account.

**Candidate Detail - Phone (iRecruitment)**

The Phone Worksheet enables you to report on the phone numbers of your candidates.

**Candidate Detail - Qualification (iRecruitment)**

The Qualification Worksheet enables you to report on the level of qualifications that your candidates have.

**Job Posting Content - Posting Detail (iRecruitment)**

The Posting Detail worksheet enables you to report on the details of the job postings that have been created for your vacancies; for example, job title, job description, and job requirements.

**Recruitment by Authorizer Analysis - Average Days to Recruit by Organization (HRMSi, EDW)**

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire; average values for both measures are given for each organization and overall. This

information is reported for each recruitment authorizer within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

#### **Recruitment by Authorizer Analysis - Average Days to Recruit by Stage and Job Category (HRMSi, EDW)**

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job category and each recruitment authorizer, during a specified calendar year (the year the applicant was hired).

#### **Recruitment by Authorizer Analysis - Average Days to Recruit by Stage and Job (HRMSi, EDW)**

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruitment authorizer, during a specified calendar year (the year the applicant was hired).

#### **Recruitment by Authorizer Analysis - Average Days to Recruit Over Time (HRMSi, EDW)**

The Average Days to Recruit Over Time worksheet measures the average number of days from both vacancy start date to hire and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruitment authorizer within a specified top-level employing organization.

#### **Recruitment by Authorizer Analysis - Average Days to Recruit (HRMSi, EDW)**

The Average Days to Recruit worksheet measures the average number of days from both the vacancy start date to hire and the application date to hire; average values for both measures are also shown. This information is given for each recruitment authorizer within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

#### **Recruitment by Authorizer Analysis - Vacancy Activity (HRMSi, EDW)**

The Vacancy Activity worksheet provides information for a specified authorizer on the status of each vacancy. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

#### **Recruitment by Recruiter Analysis - Average Days to Recruit by Organization (HRMSi, EDW)**

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire; average values for both measures are given for each organization and overall. This information is reported for each recruiter within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

#### **Recruitment by Recruiter Analysis - Average Days to Recruit by Stage and Job Category (HRMSi, EDW)**

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is

reported for each job category and each recruiter, during a specified calendar year (the year the applicant was hired).

**Recruitment by Recruiter Analysis - Average Days to Recruit by Stage and Job (HRMSi, EDW)**

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruiter, during a specified calendar year (the year the applicant was hired).

**Recruitment by Recruiter Analysis - Average Days to Recruit Over Time (HRMSi, EDW)**

The Average Days to Recruit Over Time worksheet measures the average number of days from both vacancy start date to hire and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruiter within a specified top-level employing organization.

**Recruitment by Recruiter Analysis - Average Days to Recruit (HRMSi, EDW)**

The Average Days to Recruit worksheet measures the average number of days from both the application date to hire and the vacancy date to hire; average values for both measures are also shown. This information is given for each recruiter within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

**Recruitment by Recruiter Analysis - Vacancy Activity (HRMSi, EDW)**

The Vacancy Activity worksheet provides information for a specified recruiter on the status of each vacancy within a specified period. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

**Recruitment Efficiency Comparison - Hires vs. Openings Summary (HRMSi)**

This worksheet shows the rate of hires in your organization compared to job openings.

**Recruitment Efficiency Comparison - Recruitment Activity Ratios (HRMSi)**

This worksheet investigates the cost of your recruitment activities.

**Recruitment Efficiency Comparison - Vacancy Ratios by Recruitment Activity (HRMSi)**

This worksheet investigates how successful specific recruitment activities have been.

**Recruitment Efficiency Comparison - Vacancy Ratios (HRMSi)**

This worksheet investigates how successful your recruitment has been.

**Recruitment Success Report (HRMSi)**

This report provides a trend analysis showing the changes in recruitment success over a selected period of time. You can analyze the total number of openings recorded for vacancies, the total number of openings that have been filled, and the Performance Management Framework recruitment success targets.

## **Requisition Summary Report**

Applicants and their interview schedules for a selection of vacancies.

### **Vacancy Ageing (Manager Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the number of days between the start of the vacancy and the current date, for vacancies within a hiring manager hierarchy.

### **Vacancy Ageing (Organization Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the number of days between the start of the vacancy and the current date, for vacancies within an organization hierarchy.

### **Vacancy Detail - by Grade (iRecruitment)**

The By Grade worksheet enables you to report on the vacancies that exist with a specific grade. Grade Name is a page item on this worksheet so you can group your results by the vacancy grade.

### **Vacancy Detail - by Hiring Manager (iRecruitment)**

The By Hiring Manager worksheet enables you to report on the vacancies associated with each hiring manager. Hiring Manager Name is a page item on this worksheet so you can group your results by vacancy hiring manager.

### **Vacancy Detail - by Job (iRecruitment)**

The By Job worksheet enables you to report on the vacancies that exist for a specific job. Job Name is a page item on this worksheet so you can group your results by the vacancy job.

### **Vacancy Detail - by Location (iRecruitment)**

The By Location worksheet enables you to report on the vacancies available at each location. Location Name is a page item on this worksheet so you can group your results by the location of the vacancy.

### **Vacancy Detail - by Organization (iRecruitment)**

The By Organization worksheet enables you to report on the vacancies that are available in each of your organizations.

### **Vacancy Detail - by Position (iRecruitment)**

The By Position worksheet enables you to report on the vacancies that exist for a specific position. Position Name is a page item on this worksheet so you can group your results by vacancy position.

### **Vacancy Detail - by Recruiter (iRecruitment)**

The By Recruiter worksheet enables you to report on the vacancies associated with each recruiter. Recruiter Name is a page item on this worksheet so you can group your results by vacancy recruiter.

**Vacancy Detail - by Vacancy Status (iRecruitment)**

The By Vacancy Status worksheet enables you to report on the vacancies with each vacancy status. Vacancy Status is a page item on this worksheet so you can group your results by vacancy status.

**Vacancy Detail - Detail (iRecruitment)**

The Detail Worksheet enables you to report on the details of the vacancies in your organization hierarchy.

**Vacancy Hire Success (Organization Hierarchy) Template Analytics by Year (HRMSi)**

This worksheet enables you to see vacancy success for each year. The template worksheets provide a starting point for developers to create analytic reports.

**Vacancy Hire Success (Organization Hierarchy) Template Analytics Detail (HRMSi)**

This worksheet calculates the vacancy success rates for vacancies with the same opening and closing dates, for each organization, location, job, grade, and position. The template worksheets provide a starting point for developers to create analytic reports.

**Vacancy Status (System Defaults - Manager Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the number of vacancies at each vacancy status as of the current date, within a hiring manager hierarchy. These reports only include the vacancy statuses supplied with the application. Any vacancy statuses you have added will not be taken into account by these reports.

**Vacancy Status (System Defaults - Organization Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the number of vacancies at each vacancy status as of the current date, within an organization hierarchy. These reports only include the vacancy statuses supplied with the application. Any vacancy statuses you have added will not be taken into account by these reports.

**Vacancy Success (Organization Hierarchy) Trend Analytics By Bi Month (HRMSi)**

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by bimonthlies.

**Vacancy Success (Organization Hierarchy) Trend Analytics By Month (HRMSi)**

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by months.

**Vacancy Success (Organization Hierarchy) Trend Analytics By Quarter (HRMSi)**

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by quarters.

**Vacancy Success (Organization Hierarchy) Trend Analytics By Semi Year (HRMSi)**

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by semi-years.

### **Vacancy Success (Organization Hierarchy) Trend Analytics By Year (HRMSi)**

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by years.

### **Vacancy Success (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet provides a trend analysis showing the changes in vacancy success across geographical areas.

### **Vacancy Success (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet provides a trend analysis showing the changes in vacancy success across organizations in your enterprise.

### **Vacancy Time from Fill to Start (Manager Hierarchy) Status (iRecruitment)**

This PMV report measures the average number of days between filling a vacancy and the employee starting, for vacancies that started in the reporting period, and vacancies within a hiring manager hierarchy.

### **Vacancy Time from Fill to Start (Organization Hierarchy) Status (iRecruitment)**

This PMV report measures the average number of days between filling a vacancy and the employee starting, for vacancies that started in the reporting period, and vacancies within an organization hierarchy.

### **Vacancy Time to Start (Manager Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for vacancies that start in the reporting period, and vacancies within a hiring manager hierarchy.

### **Vacancy Time to Start (Organization Hierarchy) Status PMV report (iRecruitment)**

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for vacancies that start in the reporting period, and vacancies within an organization hierarchy.

### **Workforce Recruitment Stage Analysis - Average Days to Recruit by Stage and Job Category (HRMSi, EDW)**

The Average Days to Recruit by Stage and Job Category worksheet provides recruitment information for each job category in a top-level employing organization within a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

### **Workforce Recruitment Stage Analysis - Average Days to Recruit by Stage and Job (HRMSi, EDW)**

The Average Days to Recruit by Stage and Job worksheet provides recruitment information for each job (for example, Line Manager or Sales Person) in a top-level employing organization within a specified calendar year. You can report on the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.



### **Workforce Recruitment Stage Analysis - Efficiency (Average Days) (HRMSi, EDW)**

The Efficiency (Average Days) worksheet provides information concerning the recruitment efficiency of each top-level employing organization for a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

### **Workforce Recruitment Stage Analysis - Recruitment by Age Band (HRMSi, EDW)**

The Recruitment by Age Band worksheet provides a recruitment summary by age band for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

### **Workforce Recruitment Stage Analysis - Recruitment by Disability Status (HRMSi, EDW)**

The Recruitment by Disability Status worksheet provides a recruitment summary by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

### **Workforce Recruitment Stage Analysis - Recruitment by Gender (HRMSi, EDW)**

The Recruitment by Gender worksheet provides a recruitment summary by gender for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

### **Workforce Recruitment Stage Analysis - Recruitment by Location (HRMSi, EDW)**

The Recruitment by Location worksheet provides a recruitment summary by location for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

### **Workforce Recruitment Stage Analysis - Recruitment by Organization (HRMSi, EDW)**

The Recruitment by Organization worksheet provides a recruitment summary for a specified top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

### **Workforce Recruitment Stage Analysis - Vacancy Activity by Job (HRMSi, EDW)**

The Vacancy Activity by Job worksheet provides information for a specified top-level employing organization and job on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

## **Workforce Recruitment Stage Analysis - Vacancy Activity (HRMSi, EDW)**

The Vacancy Activity worksheet provides information for a specified top-level employing organization on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

## **People Management**

### **Annualized Turnover Report (HRMSi, DBI)**

This report displays the annualized employee headcount turnover for the selected manager.

### **Annualized Turnover for Top 4 Countries Trend (HRMSi, DBI)**

The Annualized Turnover for Top 4 Countries report displays the changes over time in the annualized turnover for the top four countries at the selected date.

### **Annualized Turnover for Top 10 Countries (HRMSi, DBI)**

The Annualized Turnover for Top 10 Countries report displays the total annualized turnover, voluntary annualized turnover, and the involuntary annualized turnover for the top ten countries with the highest headcount for the selected manager.

### **Annualized Turnover by Manager Status (HRMSi, DBI)**

The Annualized Turnover for Top 4 Countries report displays the changes over time in the annualized turnover for the top four countries at the selected date.

### **Annualized Turnover Trend (HRMSi, DBI)**

This report shows changes in the annualized employee headcount turnover over time for the selected manager. The report categorizes turnover into voluntary and involuntary separations.

### **Assignment Status Report**

All employees, applicants or both assigned to selected work structures.

### **Company Certificate Report (Spain)**

Contains the personal, employment, and social security information of an employee who is terminated or on leave such as maternity leave or leave due to suspended assignment.

### **Employee Anniversary and Birthday (Multiple Hierarchies) Detail - by Organization Hierarchy**

The Organization Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON). Employees are listed by organization. Total and current service calculations are in respect of the system date (SYSDATE).

### **Employee Anniversary and Birthday (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

The Supervisor Hierarchy worksheet enables you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

**Employee Detail (HRMSi, DBI)**

The Employee Detail report displays employees details such as name, current manager, assignment location, and length of service.

**Employee by Supervisor (Multiple Hierarchies) Status - by Organization Hierarchy**

The Organization Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees, by organization.

**Employee by Supervisor (Multiple Hierarchies) Status - by Supervisor Hierarchy**

The Supervisor Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees by supervisor.

**Employee Composition Detail - by Assignment Details**

This worksheet enables you to analyze workforce assignment details by organization, job, position, or grade.

**Employee Composition Detail - by Salary Band**

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

**Employee Composition Detail - by Time In Service Band**

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

**Employee Hired or Terminated Detail for Organization Hierarchy**

This worksheet enables you to report on employees who terminated or were hired within two specified dates for a given organization and its subordinate organizations.

**Employee Mailing Address (Multiple Hierarchies, United Status Specific) Detail - by Organization Hierarchy (US)**

The Organization Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given organization and its subordinate organizations.

**Employee Mailing Address (Multiple Hierarchies, United Status Specific) Detail - by Supervisor Hierarchy (US)**

The Supervisor Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given supervisor and his/her subordinates.

**Employee Mailing Address (Multiple Hierarchies) Detail - by Organization Hierarchy**

This Worksheet enables you to report on current employee primary addresses in a non-legislative specific address format, for a given organization and its subordinate organizations.

### **Employee Mailing Address (Multiple Hierarchies) Detail - Supervisor Hierarchy**

This Worksheet enables you to report on current employee primary addresses in a non-legislative specific address format, for a given supervisor and his/her subordinates.

### **Employee Movement by Organization Analysis - Hires**

This worksheet displays hire information in detail. The worksheet enables you to analyze hire information by job, position, assignment, or location. It enables you to analyze hire trends within an organization, and analyze skills required within an organization.

### **Employee Movement by Organization Analysis - Hires, Terminations and Transfers by Quarter (HRMSi)**

This worksheet enables you to view high-level information about the value of hires, terminations, and transfers in all organizations within your Business Group, by year quarter. The resulting information allows you to analyze workforce changes by quarter, and compare workforce change across all organizations within a Business Group.

### **Employee Movement by Organization Analysis - Terminations**

This worksheet enables you to analyze terminations within your organizations in detail. For each termination you can: Analyze employee termination across all organizations within a Business Group.

### **Employee Movement by Organization Analysis - Transfers In**

This worksheet enables you to investigate the total budget value of people transferring into different organizations in your Business Group. For each transfer you can analyze the organization transferred from, the location transferred from, and the position/job transferred from.

### **Employee Movement by Organization Analysis - Transfers Out**

This worksheet investigates the total budget value of people transferring out of different organizations in your Business Group. For each transfer out you can analyze the organization transferred to, the location transferred to, and the position/job transferred to.

### **Employee Organization Transfer (Multiple Hierarchies) Detail - by Organization Hierarchy**

This worksheet enables you to report on employee primary assignment organization transfers during a given period for a given organization and its subordinate organizations. The worksheet output includes the employee primary assignment details before and after the transfer, including job name, organization name, and supervisor name.

### **Employee Organization Transfer (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

This worksheet enables you to report on employee primary assignment organization transfers during a given period for a given supervisor and his/her subordinates. The worksheet output includes the employee primary assignment details before and after the transfer, including job name, organization name, and supervisor name.

### **Employee Primary Assignment (Multiple Hierarchies) Detail - by Organization Hierarchy**

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

### **Employee Primary Assignment (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

The Supervisor Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for a given Supervisor and his/her subordinates.

### **Employee Primary Assignment Count (by Location and Employment Category, Multiple Hierarchies) Comparison - by Organization Hierarchy (HRMSi)**

The Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given organization. You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

### **Employee Primary Assignment Count (by Location and Employment Category, Multiple Hierarchies) Comparison - by Supervisor Hierarchy (HRMSi)**

The Supervisor Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given supervisor. You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

### **Employee Primary Assignment Count (by Location and Employment Category, Multiple Hierarchies) Comparison - by Without Organization Hierarchy (HRMSi)**

The Without Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location without using organization or supervisor hierarchies. You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

### **Employee Primary Assignment Count (by Organization and Employment Category, Multiple Hierarchies) Comparison - by Organization Hierarchy (HRMSi)**

The Organization Hierarchy worksheet enables you to report on employee primary assignment numbers for a given organization. The worksheet parameters enable you to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

### **Employee Primary Assignment Count (by Organization and Employment Category, Multiple Hierarchies) Comparison - by Organization Hierarchy (Rollup) (HRMSi)**

The Organization Hierarchy (Rollup) worksheet allows you to report on employee primary assignment numbers by Organization Rollup for a given organization. The worksheet parameters enable you to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

### **Employee Primary Assignment Count (by Organization and Employment Category, Multiple Hierarchies) Comparison - by Supervisor Hierarchy (HRMSi)**

The Supervisor Hierarchy worksheet enables you to report on employee primary assignment numbers by organization for a given supervisor. The worksheet parameters enable you to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

### **Employee Separation (Organization Hierarchy) Template Analytics by Year, Organization and Separation Category (HRMSi)**

This investigates separations from the workforce for different organizations and different leaving reasons over yearly periods. The template worksheets provide a starting point for developers to create analytic reports.

### **Employee Separation (Organization Hierarchy) Template Analytics Details (HRMSi)**

This worksheet tells you how separations from your workforce vary across different groups within your organization, such as organization, job, and location. For any date, you can see how many separations have occurred within each organization, location, job, grade, position, separation category, and separation reason. The template worksheets provide a starting point for developers to create analytic reports.

### **Employee Separation by Competence (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet compares employee competencies to separations across geographical areas.

### **Employee Separation by Competence (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet compares employee competencies to separations across organizations.

### **Employee Separation by Competence (Organization Hierarchy) Status Analytics by Rank Level (HRMSi)**

This worksheet enables you to see the number of people who have separated from the workforce who hold competencies at a specific rank level.

### **Employee Separation by Competence (Organization Hierarchy) Status Analytics by Scale Level (HRMSi)**

This worksheet enables you to see the number of people who have separated from the workforce who hold competencies at a specific scale level.

### **Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet compares employees' competencies, to the rate of separation, grouped by bimonthlies.

### **Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet compares employees' competencies to the rate of separation, grouped by months.

**Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet compares employees' competencies to the rate of separation, grouped by quarters.

**Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet compares employees' competencies, to the rate of separation, grouped by semi-years.

**Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet compares employees' competencies, to the rate of separation, grouped by years.

**Employee Separation by Length of Work (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet compares employees' length of service within each geographical area.

**Employee Separation by Length of Work (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet compares employees' length of service within each organization.

**Employee Separation by Length of Work (Organization Hierarchy) Status Analytics by Separation Category & Reason (HRMSi)**

This worksheet compares the length of service of employees who have separated from your enterprise, grouped by separation category and reason.

**Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each bimonthly.

**Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each month.

**Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each quarter.

**Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each semi-year.

**Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each year.

### **Employee Separation by Reason (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet investigates the different reasons for separations within geographical areas. You can determine if employees in different areas leave your enterprise for different reasons.

### **Employee Separation by Reason (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet investigates the different reasons for separations within organizations. You can determine if employees in different organizations leave your enterprise for different reasons.

### **Employee Separation by Reason (Organization Hierarchy) Status Analytics by Separation Category (HRMSi)**

This worksheet investigates the different reasons employees leave your enterprise within each separation category.

### **Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by bimonthly.

### **Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by month.

### **Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by quarter.

### **Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by semi-year.

### **Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by year.

### **Employee Summary Report**

Addresses, contacts, periods of service, assignments, special information, personal payment methods and element entries for a selected employee.

### **Employee Termination (Organization Hierarchy) Detail - Detail**

This worksheet enables you to report on employees that have separated within a specified time period. Employees are listed for a given organization and its subordinate organizations.



**Employee Termination with Comments (Organization Hierarchy) Detail - Detail**

This worksheet enables you to report on the employees that have separated within a specified time period. Employees are listed for a given organization and its subordinate organizations.

**Employment Certification Report (Hungary)**

Contains the personal, job, and pension information of a terminated employee.

**Employment Equity Templates (Payroll) (South Africa)**

Outlines the required information needed for Employment Equity as defined by the Department of Labour.

**Employment Equity Workforce Profile Report (Payroll) (South Africa)**

Outlines the required information needed for Employment Equity as defined by the Department of Labour.

**Full Applicant Details**

Applications and applicant interviews for one applicant.

**Full Assignment Details**

Assignment information including periods of service, payment methods, and element entries for one employee.

**Full Person Details**

Addresses and information entered in the Person window such as name, date of birth, nationality and work telephone number for one employee.

**Full Personal Details Report Set**

Person details, applicant details, assignment details and work details for one employee.

**Full Work Details**

Miscellaneous work information including special information, absences, recruitment activities and contacts for one employee.

**Head Count Detail Report**

The number and type of workers within an organization, as well as attrition rate data.

**Headcount Activity by Manager Status (HRMSi, DBI)**

This report displays the total employee headcount of the direct reports of the selected manager.

**Headcount for Top 4 Countries Trend (HRMSi, DBI)**

This report shows changes in headcount over time for the four countries with the highest head count for the selected manager.

### **Headcount Reorganization (Plus) Detail (HRMSi, DBI)**

The report displays the employee records that comprise the total value you drilled from in the head count report, including transfers and reorganizations. You access this report from the Plus-Transfer column in the parent head count report.

### **Headcount Hire Detail (HRMSi, DBI)**

This report lists the records that comprise the Plus-Hire value you drilled from in the Headcount report, including hires, re-hires and secondary assignment starts. You access this report from the Plus-Hire column in the Headcount report.

### **Headcount Termination Detail (HRMSi, DBI)**

The report displays the employee records that make up the total value you drilled from in the Headcount report. The report lists employees who have terminated from the manager's hierarchy in the given period, together with supporting details.

### **Headcount Reorganization (Minus) Detail (HRMSi, DBI)**

The report displays the employee records that comprise the total value you drilled from the Headcount report, including transfers and reorganizations. The report provides information about employees who have moved out of the selected manager's hierarchy.

### **Headcount Ratio by Length of Service Trend (HRMSi, DBI)**

The Headcount Ratio by Length of Service Trend report displays the headcount change over time by length of service for the selected manager.

### **Headcount Ratio with Length of Service Status (HRMSi, DBI)**

The Headcount Ratio with Length of Service report displays the total headcount ratio for different periods of service of direct reports of the selected manager.

### **Headcount Ratio by Performance Band Trend (HRMSi, DBI)**

The Headcount Ratio with Length of Service report displays the total headcount ratio for different periods of service of direct reports of the selected manager.

### **Headcount Ratio with Performance Band Status (HRMSi, DBI)**

The Headcount Ratio with Performance Band Status report displays the total employee headcount and the headcount ratio for all employee assignments for each performance band for the selected manager.

### **Hire Salary Variance (Top 10) by Job (HRMSi, DBI)**

This report displays the average salaries of new hires and compares them against the salaries of existing people in the same job, for the selected manager.

### **HRMS Profile Options Report**

Use this report to list the values of the profile options for your HRMS installation. The report also identifies which profile options have not been set for your installation.

**Human Resource Setup Detail - Employee Anniversary Birthdays**

This worksheet enables you to view employee birthdays and start dates. The worksheet also enables you to view other employee information, for example, length of service, employee number, and supervisor name.

**Human Resource Setup Detail - Employee Assignment by Organization**

This worksheet enables you to report on the assignments within an organization, by choosing a top organization and including subordinates.

**Human Resource Setup Detail - Employee Assignment by Organization Rollup**

This worksheet enables you emulate the rollup flexibility of HRMSi Reports by using an organization hierarchy to control the information displayed.

**Human Resource Setup Detail - Employee Job History**

This worksheet enables you to view employee job history across your organization.

**Human Resource Setup Detail - Employee List with Length of Work**

This worksheet enables you to analyze deployment factors associated with positions, people in specific positions, and position applicants.

**Human Resource Setup Detail - Employee Separation with Equal Opportunity (United States Specific) (US)**

This worksheet enables you to analyze terminations with ethnic origin over a specific time period.

**Human Resource Setup Detail - Person Home Address**

This worksheet enables you to view the primary addresses of employees.

**Invalid Address Report (US)**

Lists employee address information inconsistencies. In addition, identifies addresses that do not comply with SSA MMREF-1 standards or that have address lines longer than a user-specified length.

**Law SAMEN Report (Organization Structure)and Law SAMEN Report (Dutch Region) (Netherlands)**

The Law SAMEN report (Organization Structure) reports on employees within an organization structure. The Law SAMEN Report (Dutch Region) reports on employees within a specific Dutch region.

**National Defense Report (Hungary)**

Contains a list of male employees who are available to perform a national defense role.

**New Hire State Magnetic Media Report (US)**

Report on newly hired and rehired employees using magnetic media.

**New Hire State Report (US)**

Report on newly hired or rehired employees.

### **NFC Personnel Data Outbound Interface (Federal)**

Generates extract files that conform to NFC's interface requirements. Each file consists of a header, Job Control Language file, and detail records (snapshots of the Notification of Personnel records for the date range specified).

### **Passport Expiry Report (UAE)**

This report lists the employees whose passport expires within a user-specified timeframe.

### **Period of Service Reports (Germany)**

Generates reports of an employee's periods of service using selected criteria.

### **Person/Assignment History Detail - Application**

This worksheet enables you to analyze an applicant's assignment record between the start and end of an application. For each employee you can examine the total number of applications, the number of successful applications, and the length of time between different application stages.

### **Person/Assignment History Detail - Employee Separation**

This worksheet enables you track termination reasons by type, date, and length of service, allowing you to spot trends among leavers. For each termination, you can compare termination reasons to discover trends, and compare the length of time in an organization against time in a job.

### **Person/Assignment History Detail - Person Assignment**

This worksheet enables you to analyze an employee's assignment history between specific dates. For each employee you can examine the current assignment, and details of previous assignments.

### **Person Full History Report**

This report lists the personal and professional details of the employees and contingent workers in your enterprise, including assignments, salary, and contact details.

### **Person Synchronization Report**

This report shows details of any person in your current business group who also has a record in another business group on the specified date.

### **Personnel Registry Report (France)**

This report provides details of the employees and contingent workers in an organization at a given point of time.

### **RED System : New Hires, Leavers, and Contract Changes Report (Spain)**

This report contains information about the workforce and contract changes within an enterprise.

### **Saudi Contract Expiry Report (Saudi Arabia)**

The Saudi Contract Expiry Report creates a list of all the contracts that will expire in a user specified period of time.

**Saudi Iqama Expiry Report (Saudi Arabia)**

The Saudi Iqama Expiry Report creates a list of all the iqamas that will expire in a user specified period of time.

**Saudi Passport Expiry Report (Saudi Arabia)**

The Saudi Passport Expiry Report creates a list of all the passports that will expire in a user specified period of time.

**Separations By Competence Report (HRMSi)**

This report is run from the Separations by Leaving Reason report. When employees leave your enterprise you lose the competencies they possess. This can become a problem if you continue to lose people with the same abilities. This report investigates the competencies and levels of proficiency you are losing.

**Separations By Leaving Reason Report (HRMSi)**

This report is run from the Workforce Losses report. This report enables you to investigate the different reasons why your enterprise is losing workforce. It only includes the workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have ended or been suspended.

**Separations By Service Bands Report (HRMSi)**

This report is run from the Separations by Leaving Reason report. This report investigates the relationship between the reasons people give for leaving and the amount of time they have been with your enterprise.

**Separations Trend by Leaving Reason Report (HRMSi)**

Use this report to investigate the trends in why people are leaving your enterprise. This report runs from the Workforce Losses report.

**Separations Trend by Service Band Report (HRMSi)**

Use this report to investigate the trends in the length of time employees remain with your enterprise. This report runs from the Workforce Losses report.

**Social Health Insurance Report (Netherlands)**

Employees who have started and/or ended the social health insurance within a date range.

**Staff Summary Status (HRMSi, DBI)**

The Staff Summary Status report displays the headcount, average annualized salary, and the total annualized salary based on the effective date for all employee assignments in the manager's hierarchy.

**Student Employee Comparison Report**

The Student Employee Comparison Report highlights differences between data held by both Oracle HRMS and Oracle Student System (OSS), such as contact details and date of birth.

## **Tenure Notification Reports (including Tenured Status, Non-Tenured Status, Tenure Track Status and Tenure Review) (US)**

These notification reports are available for you to send to faculty members and their academic manager during the Tenure process

## **Terminations Report**

The number of employees from selected organizations leaving your enterprise within a particular period, and the reason for leaving.

## **Terminations with Active Support Order Report (US)**

Run this report to view employees with an active support order at the time of termination.

## **Terminations with Length of Service Status (HRMSi, DBI)**

The Terminations with Length of Service Status report shows the ratio of terminations for different lengths of service for the selected manager.

## **Terminations for Top 5 Job Functions (HRMSi, DBI)**

The Terminations for Top 5 Job Functions report displays total employee terminations for each of the top five job functions in the selected manager's hierarchy.

## **Termination Status (HRMSi, DBI)**

The Termination Status report displays the total terminations based on the reporting period for all employee assignments in the manager's hierarchy.

## **Training Access Individual (BIAF) Report (France)**

This report enables you to provide employee details to an employee who is on a fixed-term contract and is leaving the organization.

## **Turnover Detail (HRMSi, DBI)**

This report displays the total number of employees separated from the specified supervisor's hierarchy in the effective period.

## **Turnover Summary Status (HRMSi, DBI)**

The Turnover Summary Status report displays the voluntary annualized turnover, involuntary annualized turnover, and the total annualized turnover based on the reporting period for all employee assignments in the manager's hierarchy.

## **Turnover Ratio by Performance Band Trend (HRMSi, DBI)**

The Turnover Ratio by Performance Band report displays the changes over time in the employee turnover for different performance bands for the selected manager.

## **Turnover Ratio with Performance Band Status (HRMSi, DBI)**

The Turnover Ratio with Performance Band Status report investigates changes in employee turnover within each performance band.

## **Visa Expiry Report (UAE)**

This report lists the employees whose visa expires within a user-specified timeframe.

**Voluntary Terminations for Top 5 Reasons (HRMSi, DBI)**

The Voluntary Terminations for Top 5 Reasons report displays the top five leaving reasons for the total voluntary terminations for the selected manager.

**Worker Organization Movements Report**

New starters, terminations, transfers in, and transfers out of a selected organization or organization hierarchy.

**Workforce Assignment Activity Analysis - Grade Changes (HRMSi, EDW)**

The Grade Changes worksheet provides a summary of the head count or full time equivalent, or the average number of months between grade changes, for a specified top-level employing organization within a particular calendar year, for employees changing grade.

**Workforce Assignment Activity Analysis - Location Changes (HRMSi, EDW)**

The Location Changes worksheet provides a summary of the head count or full time equivalent for people changing locations for a specified top-level employing organization within a specified calendar year.

**Workforce Assignment Activity Analysis - Organization Changes (HRMSi, EDW)**

The Organization Changes worksheet provides a summary of the head count or full-time equivalent for employees changing organizations within a specified calendar year. Initially only the top-level employing organizations are displayed; you need to drill down to see transfers between organizations further down the organizational hierarchy.

**Workforce Comparison Report (HRMSi)**

The workforce assigned to different types of jobs can vary over time. This report compares the workforce assigned to up to three job categories over time. For example, you could compare the number of managers against the number of technical staff you employed last year.

**Workforce Composition Analysis - Composition by Age Band (HRMSi, EDW)**

The Composition by Age Band worksheet provides a summary of person head count or full-time equivalent by employee age band for a specified top-level employing organization and a specified period of time. All workforce composition data collected in that period will be included.

**Workforce Composition Analysis - Composition by Disability Status (HRMSi, EDW)**

The Composition by Disability Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a specified top-level employing organization within a specified period of time. All workforce composition data collected in that period will be included.

**Workforce Composition Analysis - Composition by Gender (HRMSi, EDW)**

The Composition by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a specified top-level employing organization and a specified period of time. All workforce composition data collected in that period will be included.

### **Workforce Composition Analysis - Composition by Location (HRMSi, EDW)**

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization within a specified period of time. All workforce composition data collected in that period will be included.

### **Workforce Composition Analysis - Composition by Period of Service (HRMSi, EDW)**

The Composition by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a specified top-level employing organization and a specified period of time. All workforce composition data collected in that period will be included.

### **Workforce Composition Analysis - Composition Summary (HRMSi, EDW)**

The Composition Summary worksheet provides a summary of person head count or full-time equivalent for top-level employing organizations and for a specified period of time. All workforce composition data collected within that period will be included.

### **Workforce Count (Organization Hierarchy) Template Analytics by Year (HRMSi)**

This worksheet analyses how your workforce fluctuates over time. The template worksheets provide a starting point for developers to create analytic reports.

### **Workforce Count (Organization Hierarchy) Template Analytics Detail (HRMSi)**

This worksheet tells you how your workforce fluctuates across different groups within your organization, such as organization, job, and location. You view the detail for one year at a time. The template worksheets provide a starting point for developers to create analytic reports.

### **Workforce Count (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by bimonthlies.

### **Workforce Count (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by months.

### **Workforce Count (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by quarters.

### **Workforce Count (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by semi-years.

### **Workforce Count (Organization Hierarchy) Trend Analytics by Year and Geography (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by year and geography.



**Workforce Count (Organization Hierarchy) Trend Analytics by Year and Organization (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by year and organization.

**Workforce Count (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by years.

**Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each bimonthly within the given date range.

**Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each month within the given date range.

**Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each quarter within the given date range.

**Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each semi-year within the given date range.

**Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each year within the given date range.

**Workforce Count Change (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce grouped by geographical area.

**Workforce Count Change (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce grouped by organization.

**Workforce Count Change (Organization Hierarchy) Status Analytics by Separation Category (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce grouped by separation category.

### **Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by geographical area.

### **Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Grade (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by grade.

### **Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Job (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by job.

### **Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by organization.

### **Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Position (HRMSi)**

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by position.

### **Workforce Count KPI Status (HRMSi)**

This Performance Management Viewer report provides you with a view of the Workforce Full Time Equivalent and Workforce head count KPI data, including target and actual values. The report displays table data by default; you can optionally display the data as a chart.

### **Workforce Count Report**

The number and type of workers within an organization, as well as attrition rate data, in summary form.

### **Workforce Count Report (Spread Sheet Version)**

The number and type of workers within an organization, as well as attrition rate data, in summary form. This version of the workforce count reports enables you to open the report in a spreadsheet format.

### **Workforce Gain (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet lists the total losses that occurred within a given time period, grouped by geographical area.

### **Workforce Gain (Organization Hierarchy) Status Analytics by Grade (HRMSi)**

This worksheet lists the total losses that occurred within a given time period, grouped by organization.

**Workforce Gain (Organization Hierarchy) Status Analytics by Job (HRMSi)**

This worksheet lists the total losses that occurred within a given time period, grouped by job.

**Workforce Gain (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet lists the total losses that occurred within a given time period, grouped by organization.

**Workforce Gain (Organization Hierarchy) Status Analytics by Position (HRMSi)**

This worksheet lists the total losses that occurred within a given time period, grouped by grade.

**Workforce Gain (Organization Hierarchy) Template Analytics by Year and Organization (HRMSi)**

This worksheet analyses how workforce gains have occurred, and compares the gains over time and across organizations. The template worksheets provide a starting point for developers to create analytic reports.

**Workforce Gain (Organization Hierarchy) Template Analytics Detail (HRMSi)**

This worksheet tells you how the gains occurred and how the gains have been deployed within the workforce. The template worksheets provide a starting point for developers to create analytic reports.

**Workforce Gain (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet lists the total gains that occurred within a given date range grouped by bimonthlies.

**Workforce Gain (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet lists the total gains that occurred within a given date range grouped by months.

**Workforce Gain (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet lists the total gains that occurred within a given date range grouped by quarter years.

**Workforce Gain (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet lists the total gains that occurred within a given date range grouped by semi-years.

**Workforce Gain (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet lists the total gains that occurred within a given date range grouped by years.

**Workforce Gains Report (HRMSi)**

Organizations within your enterprise may be gaining workforce for different reasons. This report investigates whether your workforce is increasing because of any of the following reasons: new employees are being hired by your enterprise, existing employees are being given new assignments in different parts of your enterprise, existing

employees are transferring assignments to different parts of your enterprise, or employees' assignments are being re-activated from suspended to active.

**Workforce Loss (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet lists the total losses within a given time period, grouped by geographical area.

**Workforce Loss (Organization Hierarchy) Status Analytics by Grade (HRMSi)**

This worksheet lists the total losses within a given time period, grouped by grade.

**Workforce Loss (Organization Hierarchy) Status Analytics by Job (HRMSi)**

This worksheet lists the total losses within a given time period, grouped by job.

**Workforce Loss (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet lists the total losses within a given time period, grouped by organization.

**Workforce Loss (Organization Hierarchy) Status Analytics by Position (HRMSi)**

This worksheet lists the total losses within a given time period, grouped by Position.

**Workforce Loss (Organization Hierarchy) Template Analytics by Year and Organization (HRMSi)**

This worksheet analyses when and where workforce gains occur, and compares the gains over time and across organizations. The template worksheets provide a starting point for developers to create analytic reports.

**Workforce Loss (Organization Hierarchy) Template Analytics Detail (HRMSi)**

This worksheet tells you how losses occurred and where losses occurred within the workforce. The template worksheets provide a starting point for developers to create analytic reports.

**Workforce Loss (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet lists the total losses that occurred within a given date range, grouped by bimonthly.

**Workforce Loss (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet lists the total losses that occurred within a given date range, grouped by month.

**Workforce Loss (Organization Hierarchy) Trend Analytics by Position (HRMSi)**

This worksheet lists the total losses that occurred within a given date range, grouped by position.

**Workforce Loss (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet lists the total losses that occurred within a given date range, grouped by quarter.

**Workforce Loss (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet lists the total losses that occurred within a given date range, grouped by semi-year.

**Workforce Loss (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet lists the total losses that occurred within a given date range, grouped by year.

**Workforce Losses Report (HRMSi)**

This report investigates the different reasons you are losing workforce within your enterprise. Are you losing workforce because the workforce is transferring to different parts of your enterprise, because current employee assignments are ending, because employee assignments are being suspended, or because employees are leaving your enterprise?

**Workforce Planning Summary Analysis - Composition by Location (HRMSi, EDW)**

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization and a specified period of time. All data collected in that period will be included.

**Workforce Planning Summary Analysis - Composition Summary (HRMSi, EDW)**

The Composition Summary worksheet provides a summary of workforce composition for a top-level employing organization for a specified period of time. All data collected within that period will be included.

**Workforce Planning Summary Analysis - Organization Changes (HRMSi, EDW)**

The Organization Changes worksheet provides a summary of the head count or full time equivalent for employees changing organizations within a specified calendar year. Initially only the top-level employing organizations are displayed; you need to drill down to see transfers between organizations further down the organizational hierarchy.

**Workforce Planning Summary Analysis - Recruitment by Organization (HRMSi, EDW)**

The Recruitment by Organization worksheet gives you a recruitment summary by top-level employing organization. You can report on the following measures: head count, full-time equivalent, average number of days between application and hire, and average number of days between vacancy start and hire.

**Workforce Planning Summary Analysis - Recruitment Efficiency (Average Days) (HRMSi, EDW)**

The Recruitment Efficiency (Average Days) worksheet provides information concerning efficiency of recruitment for a specified calendar year (based on the date employment started) for each top-level employing organization. You can report on the average number of days from application to termination (the date the application was ended by the employer or the applicant), first interview, second interview, offer, acceptance, and hire.

**Workforce Planning Summary Analysis - Separation by Organization (HRMSi, EDW)**

The Separation by Organization worksheet provides a summary of person head count or full-time equivalent by top-level employing organization.

### **Workforce Planning Summary Analysis - Voluntary/Involuntary Separation (HRMSi, EDW)**

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization by loss type (voluntary or involuntary) for the last 3 years and the current year.

### **Workforce Ratio Report (HRMSi)**

The workforce assigned to different types of jobs can vary over time. This report compares the percentage of workforce assigned to up to three job categories over time. If you want to investigate the absolute number of employees for different job categories rather than the percentage of employees, you can run the related Workforce Comparison report from this report.

### **Workforce Separation Analysis - Separation by Age Band (HRMSi, EDW)**

The Separation by Age band worksheet provides a summary of person head count or full-time equivalent by employee age band for a selected top-level employing organization.

### **Workforce Separation Analysis - Separation by Disability Status (HRMSi, EDW)**

The Separation by Disabled Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization.

### **Workforce Separation Analysis - Separation by Gender (HRMSi, EDW)**

The Separation by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a selected top-level employing organization.

### **Workforce Separation Analysis - Separation by Organization (HRMSi, EDW)**

The Separation by Organization worksheet provides a summary of the person head count or full-time equivalent by top-level employing organization.

### **Workforce Separation Analysis - Separation by Period of Service (HRMSi, EDW)**

The Separation by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a selected top-level employing organization.

### **Workforce Separation Analysis - Separation by Period of Service and Reason (HRMSi, EDW)**

The Separation by Period of Service and Reason worksheet provides a summary of person head count or full-time equivalent by period of service and separation reason for a selected top-level employing organization and calendar year (based on the year separation occurred).

### **Workforce Separation Analysis - Separation Reasons by Age Band, Disability Status, and Gender (HRMSi, EDW)**

The Separation Reasons by Age Band, Disability Status, and Gender worksheet provides a summary of person head count or full-time equivalent by separation reason for a selected top-level employing organization, by age band, disability status, or gender.

### **Workforce Separation Analysis - Separation Reasons by Organization (HRMSi, EDW)**

The Separation Reasons by Organization worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization, by separation type (voluntary or involuntary) and separation reason (for example, disability, poor performance, end of contract etc.).

### **Workforce Separation Analysis - Voluntary/Involuntary Separation (HRMSi, EDW)**

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a specified top-level employing organization by voluntary or involuntary separation type.

### **Workforce Separation by Rolling Month - Status PMV Report (HRMSi)**

This report helps you monitor monthly FTE and head count separation. It provides a view of the Workforce FTE Separation and Workforce head count Separation Key Performance Indicator data, including target and actual values.

### **Workforce Summary Analysis Report (HRMSi)**

This report is the first in a suite of reports that enables you to investigate workforce in your enterprise. You can review the losses, gains and total workforce you have in different organizations within your enterprise.

## **Talent Management**

### **Appraisal Detail by Organization Hierarchy**

This worksheet gives details of completed or ongoing appraisals performed on workers in a given organization, enabling you to view the participants, dates, and outcomes of multiple appraisals in one place.

### **Appraisal Detail by Supervisor Hierarchy**

This worksheet gives details of completed or ongoing appraisals performed on workers under a specified supervisor, enabling you to view the participants, dates, and outcomes of multiple appraisals in one place.

### **Competence (Skill) Development Detail - Competence Delivered by Training Courses and Classes**

This worksheet enables you to view competencies delivered by training courses and classes. The resulting information allows you to compare the competencies delivered by training to those required, and to analyze training efficiency.

### **Competence (Skill) Development Detail - Competence Requirement**

This worksheet displays competence requirements for all organizations within a Business Group. The worksheet enables you to analyze competence requirements for Business Groups, organizations, jobs, positions, and grades. For each requirement you can investigate the competencies needed for a particular job, and the skills shortages within an organization.

### **Competence (Skill) Development Detail - Person Competence Profile**

This worksheet enables you to analyze employee competency profiles by type. It allows you to view employees with similar competencies, and compare employees of similar grade.

### **Competence Levels**

This report displays the proficiency levels of employees or applicants for a competence.

### **Competence Levels (Organization Hierarchy) Detail Analytics by Person with Rank (HRMSi)**

This worksheet lists each individual that has the selected competence, and shows you both the proficiency level they have achieved, and the proficiency level translated into a proficiency rank.

### **Competence Levels (Organization Hierarchy) Detail Analytics by Person (HRMSi)**

This worksheet lists the individuals who hold a selected competence and their proficiency levels for that competence.

### **Competence Match (Organization Hierarchy) Status Analytics by Organization and Location (HRMSi)**

This worksheet enables you to see the each person's level of proficiency for the competencies for their job, grouped by organization and location.

### **Competence Match (Organization Hierarchy) Status Analytics by Person (HRMSi)**

This worksheet enables you to see individuals' proficiency levels.

### **Competence Match (Organization Hierarchy) Status Analytics by Person Graph (HRMSi)**

This worksheet breaks down each competence relevant to the selected job into percentages below, within, and above the required proficiency ranges for the job. It shows how an individual's competencies map to the requirement range.

### **Competence Match (Organization Hierarchy) Status Analytics Compare to Minimum Proficiency (HRMSi)**

This worksheet compares people's proficiency levels with the minimum proficiency requirement for each competence relevant to their job.

### **Competence Match (Organization Hierarchy) Status Analytics Compare to Range (HRMSi)**

This worksheet compares people's proficiency levels to the required proficiency range for each competence relevant to their job.

### **Competence Updates after Appraisal by Organization Hierarchy**

This worksheet lists competence updates resulting from completed appraisals performed on workers in a given organization.

### **Competence Updates after Appraisal by Supervisor Hierarchy**

This worksheet lists competence updates resulting from completed appraisals performed on workers under a specified supervisor.



## **Group Competencies Report (HRMSi)**

For each job and grade this report displays the proficiency levels for your employees or applicants in each required competence.

## **Individual Competencies Report (HRMSi)**

This report is run from the Group Competencies report. This report compares an individual's competencies against the required competencies for the job and grade they hold. If your employee does not have the proficiency level you require, a training course may exist to help. By clicking on a competence, you can run the Training Classes By Competence report to display courses that offer the selected competence.

## **Learning Management**

### **Delegate Chargeback (Training Center Hierarchy) Detail - Delegate Chargeback (OLM)**

This worksheet investigates the amount transferred between two cost centers within an enterprise for internal learner enrollments.

### **Employee Training Attendance Success (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)**

This worksheet investigates how successfully employees in different geographical areas are attending training classes.

### **Employee Training Attendance Success (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet investigates how successfully employees in different organizations are attending training classes.

### **Employee Training Attendance Success (Organization Hierarchy) Template Analytics by Year (HRMSi)**

This worksheet enables you to see training success for each year. The template worksheets provide a starting point for developers to create analytic reports.

### **Employee Training Attendance Success (Organization Hierarchy) Template Analytics Detail (HRMSi)**

This worksheet calculates the training success rates for classes with the same start and end dates, for attendees in each organization, location, job, grade, and position. The template worksheets provide a starting point for developers to create analytic reports.

### **Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Bi Month (HRMSi)**

This worksheet investigates how successfully employees are attending classes, grouped by bimonthlies.

### **Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Month (HRMSi)**

This worksheet investigates how successfully employees are attending classes, grouped by months.

### **Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Quarter (HRMSi)**

This worksheet investigates how successfully employees are attending classes, grouped by quarters.

### **Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Semi Year (HRMSi)**

This worksheet investigates how successfully employees are attending classes, grouped by semi-years.

### **Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Year (HRMSi)**

This worksheet investigates how successfully employees are attending classes, grouped by years.

### **Class Player Progress - by Player Status (OLM)**

This worksheet investigates the progress of your Oracle Learning Management-hosted classes by the number of learners at each Player Status. The Player Status categories are Completed, Passed, Incomplete, Not Attempted, and Failed.

### **Class Player Progress - by Total Time Taken Status (OLM)**

This worksheet investigates the progress of your Oracle Learning Management hosted classes by the total time that learners have been playing content of a class within the OLM player.

### **Class Player Progress - Completion Summary (OLM)**

This worksheet presents all relevant completion details for OLM classes.

### **Class Ranking Status - by Attendance (HRMSi)**

This worksheet enables you to analyze the popularity of classes by ranking them by class attendance.

### **Class Ranking Status - by Class Days (HRMSi)**

This worksheet enables you to investigate the popularity of classes by ranking them by class days.

### **Class Resource (Training Center Hierarchy) Detail - Booked Resources per Class**

This worksheet enables you to analyze the resources booked for specific classes.

### **Class Resource (Training Center Hierarchy) Detail - Class Enrollments**

This worksheet enables you to investigate the number of learners who enroll in a class, and the number of learners who successfully attend the class.

### **Class Resource (Training Center Hierarchy) Detail - Classes Without Instructor**

This worksheet enables you to investigate the classes that have no associated trainer.

### **Class Resource (Training Center Hierarchy) Detail - Classes Without Venue**

This worksheet enables you to investigate classes that have no associated venue.

### **Class Resource (Training Center Hierarchy) Detail - Overbooked Resources**

This worksheet enables you to analyze overbooked resources.

**Class Resource (Training Center Hierarchy) Detail - Required Resources Missing**

This worksheet enables you to investigate the resources that are required but have not been booked for a class.

**Class Resource (Training Center Hierarchy) Detail - Resource Checklist**

This worksheet displays the list of resources required to successfully run a class.

**Class Resource (Training Center Hierarchy) Detail - Resource Schedule**

This worksheet enables you to view the schedule for each training resource, to ensure that resources are not booked for more than one class at any one time.

**Class Resource (Training Center Hierarchy) Detail - Suppliable Resources**

This worksheet enables you to analyze the cost and availability of suppliable resources for your class.

**Class Resource (Training Center Hierarchy) Detail - Training Classes**

This worksheet enables you to investigate the location, start date, and duration of specific classes.

**Player Progress Detail - by Player Status (OLM)**

This worksheet enables you to analyze the progress of learners in your OLM-hosted classes by Player Status.

**Player Progress Detail - by Total Time Taken Status (OLM)**

This worksheet investigates the progress of individual learners in your OLM-hosted classes, by the total time they have been playing content using the OLM player.

**Learner Attendance (Internal) Detail - Attendance Summary**

This worksheet enables you to analyze the number of internal learners attending classes. You can view internal learner attendance by activity type, analyze success rates and information about failures.

**Learner Success (External) Status - by Company (HRMSi)**

This worksheet enables you to analyze the success of training hours delivered to external learners for a company. You can investigate this for a business group and year.

**Learner Success (External) Status - by Company and Year (HRMSi)**

This worksheet enables you to analyze the success of training hours delivered to external learners for a company, for different years. You can investigate this for a business group and each company.

**Learner Success (Internal) Trend - by Job and Year (HRMSi)**

This worksheet enables you to analyze the number of training hours delivered to internal learners for a job by year, and the success of these hours. You can investigate learner success rates for a business group and organization within your enterprise.

**Learner Success (Internal) Trend - by Job Category and Year (HRMSi)**

This worksheet enables you to analyze the number of training hours delivered to internal learners each year for a job by category, and the success of these hours. You can investigate learner success rates for a business group and organization within your enterprise.

**Learner Success (Internal) Trend - by Location and Year (HRMSi)**

This worksheet enables you to analyze the number of training hours delivered to internal learners for a location each year, and the success of these hours. You can investigate learner success rates for a business group and organization within your enterprise.

**Learner Success (Internal) Trend - by Organization and Year (HRMSi)**

This worksheet enables you to analyze the number of training hours delivered to internal learners each year, and the success of these hours. You can investigate learner success rates for a business group and organization within your enterprise.

**Training Classes by Competence (HRMSi)**

This report is run from the Individual Competencies report. This report enables you to investigate classes that provide a selected competence. The report displays the class time, the competence level delivered, the dates the class is run, the class title and status, the number of class places, the class venue and the cost.

**Training Cost and Revenue Analysis - by Competence (HRMSi)**

This worksheet enables you to analyze the cost and revenue of training classes by the competence achieved if a learner successfully completes the class.

**Training Cost and Revenue Analysis - by Sponsoring Organization (HRMSi)**

This worksheet enables you to analyze the cost and revenue of classes for different organizations, by business group and year.

**Training Cost and Revenue Analysis - by Sponsoring Organization and Year (HRMSi)**

This worksheet enables you to analyze the costs and revenue associated with training for different years. You can investigate costs and revenue for a business group and sponsoring organization.

**Training Cost and Revenue Analysis - by Course (HRMSi)**

This worksheet enables you to analyze the cost and revenue generated by courses. You can investigate courses for a specific business group, sponsoring organization, and year.

**Training Cost and Revenue Analysis - by Course and Year (HRMSi)**

This worksheet enables you to analyze the cost and revenue of courses for different years, by business group and sponsoring organization.

**Training Cost and Revenue Analysis - by Training Category (HRMSi)**

This worksheet enables you to analyze the cost and revenue of classes for a training category. You can investigate costs and revenue for a business group, sponsoring organization, and year.

**Training Cost and Revenue Analysis - by Training Center (HRMSi)**

This worksheet enables you to analyze the costs and revenue of a class for a training center, by business group, sponsoring organization, and year.

**Training Cost and Revenue Analysis - by Training Center and Year (HRMSi)**

This worksheet enables you to analyze the cost and revenue of courses for different years. You can investigate by business group, sponsoring organization, and training center.

**Training Cost and Revenue Analysis - by Training Category and Year (HRMSi)**

This worksheet enables you to analyze the cost and revenue of classes in different years. You can investigate costs and revenue for a business group, sponsoring organization, and training category.

**Training Cost and Revenue Analysis - Competence by Year (HRMSi)**

This worksheet enables you to analyze the cost and revenue of courses by competence and year.

**Training Class Ranking by Amount Status - Class Ranking by Amount (HRMSi)**

This report investigates the total amount of money generated by enrollments in each class, and allows classes to be ranked by the enrollment revenue generated.

**Training Success (HRMSi)**

This report enables you to investigate how successfully employees are attending training courses for a particular organization, location, job, and job category. You can also display your PMF targets by selecting a business plan.

**Training Success Analysis - by Competence (HRMSi)**

This worksheet enables you to investigate the success rate of a course by competencies. You can investigate competencies for a sponsoring organization and year.

**Training Success Analysis - by Sponsoring Organization (HRMSi)**

This worksheet enables you to investigate the training success rate of classes for different sponsoring organizations.

**Training Success Analysis - by Course (HRMSi)**

This worksheet enables you to investigate the success rate of different courses. You can investigate courses by year and sponsoring organization.

**Training Success Analysis - by Training Category (HRMSi)**

This worksheet enables you to investigate the training success rate of events by training category. You can investigate different training categories for a business group and year.

**Training Success Analysis - by Training Center (HRMSi)**

This worksheet enables you to investigate the training success rate of different training centers, by business group and year.

### **Training Success Analysis - for a Competence by Year (HRMSi)**

This worksheet enables you to investigate the training success rate of courses for a competence over a number of years. You can investigate a competence for each sponsoring organization.

### **Training Success Analysis - for a Sponsor Organization by Year (HRMSi)**

This worksheet enables you to investigate the training success rate of classes for a sponsoring organization for each year.

### **Training Success Analysis - for a Course by Year (HRMSi)**

This worksheet enables you to investigate the success rate of courses each year. You can investigate courses by business group and course.

### **Training Success Analysis - for a Training Category by Year (HRMSi)**

This worksheet enables you to investigate the training success rate of a class in different years. You can analyze training success for a business group and training category.

### **Training Success Analysis - for a Training Center by Year (HRMSi)**

This worksheet enables you to investigate the training success rate of a training center over a number of years. You can analyze success by business group and training center.

## **General Compensation Structures**

### **Element Link Details Report (Payroll)**

The eligibility criteria for an element or group of elements.

## **Salary, Grades, and Pay Administration**

### **Average Salary for Top 4 Countries Trend (HRMSi, DBI)**

The Average Salary for Top 4 Countries Trend report calculates the average annualized salary over time for all employee assignments for each selected country.

### **Average Salary By Group Report (HRMSi)**

This report enables you to investigate the average salaries for different groups of employees. You can also select which area of your enterprise you want to investigate.

### **Average Salary Trend Report (HRMSi)**

This report reviews salary trends in different areas of your enterprise. It displays the average salary of all your employees who match the selection criteria. You can investigate the trends in average salaries for different organizations, jobs, grades, and locations. You can also choose the currency you want to view the salaries in, and include or exclude salaries that are not paid in your chosen currency.

### **Batch Enrollment - Grade/Step Progression Process**

This process updates the appropriate assignment records with the default grade ladder name and creates benefits enrollment records for employees who are on the default grade ladder.

### **Current and Projected Progression Point Values Report**

The *expected* results of running the Increment Progression Points process, that is the projected point and value changes for a group of employees.

### **Employee Increment Results Report**

The *actual* results of running the Increment Progression Points process, that is progression point and value changes for a group of employees.

### **Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies, United States Specific) Detail - by Organization Hierarchy (US)**

This worksheet enables you to report on employee details, based on the employee primary assignment in the United States legislation, for a given organization and its subordinate organizations.

### **Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies) (United States Specific) Detail - by Supervisor Hierarchy (US)**

This worksheet enables you to report on employee details based on the employee primary assignment in the United States legislation, for a given supervisor and his/her subordinates.

### **Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies) Detail - by Organization Hierarchy**

This worksheet enables you to report on employee details based on the employee primary assignment (in a non-legislative specific format) for a given organization and its subordinate organizations.

### **Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

This worksheet enables you to report on employee details based on the employee primary assignment (in a non-legislative specific format) for a given supervisor and his/her subordinates.

### **Employee Primary Assignment with Salary (Multiple Hierarchies) Detail - by Organization Hierarchy**

This worksheet enables you to report on employee details based on employee primary assignment, in a non-legislative specific format, for a given organization and its subordinate organizations.

### **Employee Primary Assignment with Salary (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

This worksheet enables you to report on employee details based on employee primary assignment, in a non-legislative specific format, for a given supervisor and his/her subordinates.

**Employee Salary (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by bimonthly.

**Employee Salary (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by month.

**Employee Salary (Organization Hierarchy) Trend Analytics by Month and Organization (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by month and organization.

**Employee Salary (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by quarter.

**Employee Salary (Organization Hierarchy) Trend Analytics by Quarter and Organization (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by quarter and organization.

**Employee Salary (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by semi-year.

**Employee Salary (Organization Hierarchy) Trend Analytics by Year and Organization (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by year and organization.

**Employee Salary (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet lists the average salaries of employees, within a given date range, grouped by year.

**Employee Salary and Grade Range (Organization Hierarchy) Trend Analysis Full Details (HRMSi)**

This worksheet compares employees' salaries to their grade minimum, mid, and maximum points, and displays the value required for the employee's salary to reach the next point in the grade. It also includes details of employees' organization, location, job, and position.

**Employee Salary and Grade Range (Organization Hierarchy) Trend Analysis Graph (HRMSi)**

This worksheet displays a table and a chart that compare each employee's salary to the minimum, mid, and maximum points for their grade.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Age Band (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by Age Band.



**Employee Salary by Group (Organization Hierarchy) Status Analytics by GB Ethnic Group (HRMSi) (UK)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by UK ethnic group.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Gender (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by gender. Employee Salary by Group (Organization Hierarchy) Status Analytics by US Ethnic Group Worksheet (HRMSi) (US) This worksheet enables you to investigate the average salaries of different groups of employees, grouped by US ethnic group.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Grade (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by grade.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Job (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by job.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Length of Work Band (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by Length of Work Band.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Location (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by location.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Organization (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by organization.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Performance Rating (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by performance rating.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by Position (HRMSi)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by position.

**Employee Salary by Group (Organization Hierarchy) Status Analytics by US Ethnic Group (HRMSi) (US)**

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by US ethnic group.

**Employee Salary by Job and Grade (Multiple Hierarchies) Status - by Organization Hierarchy (HRMSi)**

This worksheet enables you to compare employee salaries for each job and grade. For a given organization and its subordinate organizations, the average, minimum, and maximum employee salaries for jobs and grades are shown.

**Employee Salary by Job and Grade (Multiple Hierarchies) Status - by Supervisor Hierarchy (HRMSi)**

This worksheet enables you to compare employee salaries for each job and grade. For a given supervisor and his/her subordinates, the average, minimum, and maximum employee salaries for jobs and grades are shown.

**Employee Salary Change (Multiple Hierarchies) Detail - by Organization Hierarchy**

This worksheet enables you to report on employee salary change details by organization for a given time period.

**Employee Salary Change (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

This worksheet enables you to report on employee salary change details by supervisor for a given time period.

**Employee Salary Change Detail - by Gender**

This worksheet enables you to analyze salary change within your organization, by gender. It allows you to analyze differences in salary changes between male and female employees across organizations.

**Employee Salary Change Detail - by Performance Rating**

This worksheet enables you to investigate the effects of performance ratings on employee salary change across organizations. It allows you to ensure employees are rewarded for performance.

**Employee Salary Change Detail - by Person**

This worksheet enables you to investigate salary changes for individual employees.

**Employee Salary Change Detail - by Years of Service**

This worksheet displays salary change information by years of service across organizations. The resulting information allows you to compare salary change across Business Groups and organizations, and view salary change information by length of service.

**Employee Salary Change Detail - Summary**

This worksheet enables you to view information about salary changes within your organization. The resulting information allows you to analyze salary changes across all organizations in a Business Group.

**Employee Salary Component (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

Use this worksheet to investigate the cost of salary changes for each change component across different bimonthlies.

**Employee Salary Component (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

Use this worksheet to investigate the cost of salary changes for each change component across different months.

**Employee Salary Component (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

Use this worksheet to investigate the cost of salary changes for each change component across different quarters.

**Employee Salary Component (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

Use this worksheet to investigate the cost of salary changes for each change component across different semi-years.

**Employee Salary Component (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

Use this worksheet to investigate the cost of salary changes for each change component across different years.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Age (HRMSi)**

This worksheet investigates the spread of salaries across employee ages.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Grade (HRMSi)**

This worksheet investigates the spread of salaries within grades.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Job (HRMSi)**

This worksheet investigates the spread of salaries within jobs.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Length of Service (HRMSi)**

This worksheet investigates the spread of salaries within Length of Service bands.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Location (HRMSi)**

This worksheet investigates the spread of salaries within locations.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Organization (HRMSi)**

This worksheet investigates the spread of salaries within organizations.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Performance Rating (HRMSi)**

This worksheet investigates the spread of salaries across performance ratings.

**Employee Salary Spread (Organization Hierarchy) Detail Analytics by Position (HRMSi)**

This worksheet investigates the spread of salaries within positions.

**Employee with Tenure (Multiple Hierarchies) Detail - by Organization Hierarchy**

This worksheet enables you to report on employee tenure details (based on the employee primary assignment in a non-legislative specific format) for a given organization and its subordinate organizations.

**Employee with Tenure (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

This worksheet enables you to report on employee tenure details (based on the employee primary assignment in a non-legislative specific format) for a given supervisor and his/her subordinates.

### **Headcount and Salary Trend (HRMSi, DBI)**

This report shows changes in head count and salaries over time for the selected manager.

### **Headcount and Salary Top 10 Countries (HRMSi, DBI)**

This report displays the total employee head count, percentage headcount change, average salary and percentage average salary change for the countries with the highest head count for the selected manager.

### **Participation Process: Grade Step**

This is the Grade/Step Progression pre-process that evaluates your employees one at a time, to determine the set of grades and/or steps to which an employee is eligible to progress.

### **Process Employees Progressed Manually Process**

Run this process for the manual progressions to come into effect, if you have set up your grade ladder to approve progressions manually. You run this process after you have approved or rejected the proposed progressions using the Approvals: Grade/Step Progression page

### **Recalculate Participant Values: Grade/Step Progression process**

Use this process to automatically update employee salary, if there is a change in the rates of the grade or step on which you placed the employee. This process applies only to those employees whose grade ladder supports automatic salary updates.

### **Rank Employees for Grade/Step Progression Process**

This process computes the ranks of all the employees on a ranking-enabled grade ladders, on the basis of their total scores for the eligibility criteria they satisfy.

### **Salary by Manager (HRMSi, DBI)**

The Salary report displays the employee total salary, average salary, and salary change percent of all direct reports for the selected manager.

### **Salary by Job Function Status (HRMSi, DBI)**

This report is similar to the Salary report, except that it presents a view of the selected manager's employees by job function. You can access this report from the Total Salary column in the parent Salary report.

### **Salary by Job Family Status (HRMSi, DBI)**

This report is similar to the Salary report, except that it presents a view of the selected manager's employees by job family. You can access this report from the Job Function names in the Salary by Job Function report.

### **Salary and Grade Range Report (HRMSi)**

Using Oracle HRMS you can define the minimum, mid points and maximum salaries for different grades in your enterprise. This report enables you to investigate how salaries relate to grade rates, including which employees are paid more than the maximum for their grade, which employees are paid below the mid point or maximum for their grade

and by how much, and what would be the cost of increasing a group of employees to the mid point or maximum for their grade.

### **Salary Component Trend Report (HRMSi)**

The amount your enterprise spends on salaries is likely to change over time. Oracle HRMS enables you to record a reason for each salary increase you give to an employee. Use the Salary Component Trend report to investigate the total cost of salary changes for each change component you have identified.

### **Salary Distribution Within Grade Range PMV Report (HRMSi)**

This report provides a view of the Workforce Below Grade Mid Point and Workforce Above Grade Mid Point Key Performance Indicator data. The report displays table data by default; you can optionally display the chart.

### **Salary Review Report**

Current, past and proposed salaries for a selected list of employees.

### **Salary Spread Report (HRMSi)**

Within your enterprise it is useful to know the salary ranges for different groups of employees. This report investigates the spread of salaries by four different criteria: age (in years), length of service (in years), grade, and Performance Rating.

### **Salary Survey Comparison - Salary Survey Mappings (HRMSi)**

This worksheet enables you to analyze salary surveys, which have been mapped to particular jobs or positions.

### **Salary to Grade Range Mid Point Variance PMV Report (HRMSi)**

This report provides a view of the Salaries Varying From Grade Mid Point Key Performance Indicator data. The report displays table data by default; you can optionally display the chart.

## **Compensation and Awards Management**

### **Compensation Detail Report**

This report displays details of a compensation plan in a single report. It is a summary of employees receiving compensation under the plan, details about their award, and assignment information.

### **Combined Plan View**

This report compares results of different compensation plans in one report.

### **Employee Stock Option History Report**

This report displays stock option history for current employees, including an estimated walk-away value at a summary and employee level.

### **Flexible Summary**

This report displays summarized compensation information for each direct report. It also displays allocations you made for example, allocations for a country, or a job.

### **Administration Progress Report**

Is a progress report for any global plan after running the group compensation process, during the allocation period, or after running the compensation post process.

### **Employee Compensation History Report**

This report displays the compensation history for an employee irrespective of the current compensation period.

### **Audit History Report**

This report enable you to track changes managers make to records in CWB. The report tracks changes such as Update Stated Salary and Update Performance Rating.

### **Manager Feedback Report**

This report displays consolidated manager feedback about the Compensation Workbench system. The report provides a summary region that provides the count of managers who rated Compensation Workbench.

### **Salary Statistics Report**

This report provides an insight into the details of the enterprise's salary expenses. The report provides details of the total salaries, mean and median salaries, growth of salaries over time. The report also displays how salaries line up against defined measures such as grade ranges or market data.

### **Compensation Workbench Post Process Run Reports**

This report displays details of the Compensation Workbench: Post Process. It also displays the following additional reports:

- Post Process Audit Report - displays all successes and failures on the post process, showing local and corporate currency amounts.
- Post Process Summary Report - displays a summary of data proposed in CWB versus the actual data posted to Oracle HRMS.
- Error Log Report - displays the error log

### **Batch Process Run Reports**

This report displays details of all Total Compensation Statement batch processes you run. Its also displays the following additional reports:

- Summary Report - displays details of the request and a summary of the results including number of eligible persons, number of persons processed, number of persons that processed with errors, and so on.
- Audit Log - displays request details and other details such as total eligible persons, persons with statements created, total persons with errors, and so on. The report also displays all the eligible people processed and for each of these persons, whether or not the process was successful.

- Error Report - displays the error report for the process. It displays request details, total persons with errors, and total assignments with errors
- View Log - displays the log file for the process

#### **Mass Awards Deselection (Federal)**

Lists employees deselected for a mass award

#### **Mass Awards Listing by Employees (Federal)**

Notification of Personnel Action in list form for an individual employee selected for a mass award

#### **Mass Awards NPA Listing for All Employees (Federal)**

Notification of Personnel Action in list form for employees selected for a mass award

#### **Mass Award Preview (Federal)**

Lists employees selected for a mass award

#### **Mass Salary Deselection (Federal)**

Lists employees deselected for a salary adjustment

#### **Mass Salary PA Listing for All (Federal)**

Notification of Personnel Action in list form for employees selected for a salary adjustment

#### **Mass Salary PA Listing for Employee (Federal)**

Notification of Personnel Action in list form for an individual employee selected for a salary adjustment

#### **Mass Salary Preview (Federal)**

Lists employees selected for a salary adjustment

### **Leave and Absence Management**

#### **Absence Action List Report**

Details the re-integration actions to be performed for employees.

#### **Absence Hours Report (HRMSi)**

This report investigates the absence hours recorded for employees in your enterprise. You can select the employees you want to run the report for by organization, location, job category, job, and grade. You can also run the report for the time period of your choice.

#### **Absence Report (FR) (France)**

Lists the details regarding the employer, absences and the salaries received by the employee over a reference period for reporting to the French Local Social Security (CPAM).

**Absence Report (HU) (Hungary)**

Lists the normal and sickness holiday days an employee is entitled to annually.

**Absences Report**

Absence details for an employee or organization, for some or all absence types.

**Daily Sick and Recovery Report (Netherlands)**

Details all new instances of sick employees and all employees who have recovered from an illness.

**Employee Absence Hours (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)**

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by bimonthly.

**Employee Absence Hours (Organization Hierarchy) Trend Analytics by Month (HRMSi)**

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by month.

**Employee Absence Hours (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)**

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by quarter.

**Employee Absence Hours (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)**

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by semi- year.

**Employee Absence Hours (Organization Hierarchy) Trend Analytics by Year (HRMSi)**

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by year.

**Employee Hours Worked (Organization Hierarchy) Trend Analytics by Payroll Period (HRMSi)**

This worksheet investigates the number of overtime and regular hours worked. The worksheet displays the number of hours worked for each overtime band you use in your enterprise, such as double time or time-and-a-half.

**Employees on Leave (Multiple Hierarchies) Detail - by Organization Hierarchy**

This worksheet enables you to report on employees who are on leave on the effective date chosen. Employees are listed for a given organization and its subordinate organizations.

**Employees on Leave (Multiple Hierarchies) Detail - by Supervisor Hierarchy**

This worksheet enables you to report on employees who are on leave on the effective date chosen. Employees are listed for a given supervisor and his/her subordinates.

**Hours Worked Report (HRMSi)**

This report investigates the number of overtime and regular hours worked. The report displays the number of hours worked for each overtime band you use in your



enterprise, such as double time or time-and-a-half. You can run the report for a selected time period.

**Leave Details Report (Payroll) (South Africa)**

This report is used for monitoring and analyzing employee absences (sample report).

**Leave Liability Report (Payroll) (Australia)**

Displays leave balances for employees.

**Leave Liability Report (New Zealand)**

Displays the accrued debt owed by an organization for the leave balances of their employees.

**Leave Liability Report (Payroll) (South Africa)**

Calculates monetary value of accrued leave (sample report).

**Maximum SSP Weeks Report (UK)**

Provides details of employees who have had absences for 22 weeks or longer, enabling you to monitor long periods of incapacity for work (PIWs) which have reached, or are approaching, the maximum number of weeks that SSP can be paid.

**Open Sickness Absences Report (UK)**

Provides information on current sickness absences.

**SAP Element Results Report (UK)**

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

**SMP Element Results Report (UK)**

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

**SPP Adoption Element Results Report (UK)**

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

**SPP Birth Element Results Report (UK)**

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

**SSP Element Result Listing (UK)**

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

**Statutory Adoption Pay Report (UK)**

Provide information on the statutory payment history for a specified period, for each employee included in the report.

**Statutory Maternity Pay Report (UK)**

Provide information on the statutory payment history for a specified period, for each employee included in the report.

**Statutory Paternity Birth Pay Report (UK)**

Provide information on the statutory payment history for a specified period, for each employee included in the report.

**Statutory Paternity Adoption Pay Report (UK)**

Provide information on the statutory payment history for a specified period, for each employee included in the report.

**Statutory Sick Pay Report (UK)**

Provide information on the statutory payment history for a specified period, for each employee included in the report.

**Health and Welfare Management****COBRA Benefit Initial Information (US)**

This report--typically sent to employee new hires--provides general information about COBRA.

**COBRA Benefits Notification Letter (US)**

This report provides electable choice information to persons who are eligible for COBRA.

**COBRA Coverage or Payments Report (US)**

Coverage of payments report.

**COBRA Standard Letters (including Expiration and Grace Period Expiration) (US)**

Publish a standard COBRA letter.

**COIDA Report (Payroll) (South Africa)**

Compensation for Occupational Injuries & Diseases Act report.

**Eligibility and Enrollment List**

Run this report to list the total number of eligible and enrolled participants in plans you administer for Standard and Advanced Benefits, Individual Compensation Distribution, and Compensation Workbench. The report also lists newly ineligible and de-enrolled participants.

**HIPAA Dependent Letter (US)**

Run this report to generate a HIPAA certificate for qualified dependents only, such as for instances where a dependent ages out of a plan.

**HIPAA Letter (US)**

Run this report to generate a HIPAA certificate for qualified participants and their dependents

**Life Events Summary Report**

Run this report to analyze life events that occur to your compensation and benefits participants. The report lists the total number of potential and active life events, and their status, for a specified period.

**Premium Reconciliation Report**

Run this report to support the monthly benefits billing reconciliation process. This report compares monthly premium amounts to standard rates and element entries by pay period, for all participants enrolled during the reporting period.

**Other Payroll Earnings and Deductions****Union Deductions Report (Payroll) (UK)**

Total deductions that your employees pay to unions.

**Payrolls****Payroll Statutory Calendar Report (Payroll) (UK)**

The sequence of regular payment dates for each payroll and the numbers of assignments completed, pre-paid and paid within a run.

**Payroll Report (Check list for Unemployment Insurance) (Payroll) (Japan)**

This is a list to check details of unemployment insurance insured employee

**Payroll Report to Create File-Notification Change Address for Welfare Pension Insurance (Payroll) (Japan)**

This notification file is submitted by the business proprietor to the social insurance office when an insured employee's address is changed.

**Payroll Report to Create File-Notification of Disqualification for Welfare Pension Insurance (Payroll) (Japan)**

This notification file is submitted by the business proprietor to the social insurance office when the insured employee loses qualification because of some reason (termination, death, etc.)

**Payroll Report to Create File-Notification of Geppen for Welfare Pension Insurance (Payroll) (Japan)**

This notification file is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums are changed without waiting for the following regular determination because of rise in pay etc.

**Payroll Report to Create File-Notification of Qualification for Welfare Pension Insurance (Payroll) (Japan)**

This notification file is submitted by the business proprietor to the social insurance office when the person applicable to Article 9 of Welfare Pension Insurance Law or the 10th article is employed.

**Payroll Report to Create File-Notification of Santei for Welfare Pension Insurance (Payroll) (Japan)**

This notification file is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums in and after October of the year are determined based on their earnings.

**Payroll Payment and Distributions****Cheque Listing (Payroll)**

Cheque payments made to employees.

**Cheque Listing (Payroll) (South Africa)**

Cheque payments made to employees.

**Coinage Analysis Report (Payroll) (South Africa)**

A cash analysis which provides a breakdown of the cash required.

**Credit Transfer Payments Report (Payroll) (South Africa)**

Paid/unpaid cheque values per bank branch.

**Deduction Register Report (Payroll) (South Africa)**

Deductions per element per employee.

**Deposit Schedule Report (Payroll) (South Africa)**

For credit transfer payments into bank accounts.

**Employment Equity Income Differential Report (Payroll) (South Africa)**

Outlines the required information needed for Employment Equity as defined by the Department of Labour.

**Gross to Net Summary (Payroll) (UK)**

Details of total earnings and deductions summarized for a specified payroll and payroll period.

**Gross to Net Summary (Payroll) (US)**

Details of total earnings and deductions summarized for a specified payroll and payroll period.

**IE Cheque Listing (Payroll) (Ireland)**

Cheque payments made to employees.

**Manual Payments Report (Payroll) (South Africa)**

Manual payments made for selected payruns and assignments.

**Pay Advice (Payroll) (Australia)**

Generates pay advice for all employees for a specified payroll and period.

**Pay Advice (Payroll) (Singapore)**

Provides pay advice details in a customizable format, either for single assignments or all assignments on a payroll, after PrePayments process is complete for the payroll.

**Pay Advice (Payroll) (South Africa)**

A sample pay advice.

**Pay Advice (Payroll) (France)**

Presents Pay Advice details in a customizable format, either for single assignments or for all assignments on a payroll after PrePayments process is complete for the payroll.

**Pay Advice (Payroll) (New Zealand)**

Generates pay advice for all employees for a specified payroll and period.

See: *Oracle HRMS for New Zealand User Supplement*.

**Pay Advice (Payroll) (Hong Kong)**

Details about employees' income and deductions.

**Pay Advice (Payroll) (UK)**

Pay advice details in a customizable format, either for single assignments or for all assignments on a payroll after PrePayments process is complete for the payroll.

**Payment Output File (Dutch)**

Run this report to initiate the creation of the EFT Payment file. Produced in the format required by the official body Interpay, the EFT Payment file enables you to send employee payment details to your bank on magnetic tape.

**RSC Levy Report (Payroll) (South Africa)**

The amount of levies to be paid per RSC region.

**Saudi Payment Output File (Payroll) (Saudi Arabia)**

Run this report to initiate the creation of the EFT Payment file. The EFT Payment file enables you to send employee payment details to your bank on magnetic tape.

**Saudi Payslip Report (Payroll) (Saudi Arabia)**

Use this report to generate both online and printed payslips for employees. Online payslips enable employees to view their payslips information online, and helps reduce overheads, administration, and maintenance costs.

**Skills Development Levy Report (Payroll) (South Africa)**

Skills development levy per SETA or per organization within SETA.

**Statement of Earnings (Payroll) (US)**

Check writer process produces paychecks with statement of earnings.

**Separation Pay E-file Report (Payroll) (Korea)**

Oracle Payroll generates a report about separation pay, based on the Separation Pay Archive. Once generated, the employer can view, and print the report, and store it on magnetic tape to send to National Tax Service (NTS).

**Separation Pay Slip Report (Payroll) (Korea)**

Run this report to generate a pay slip with the earnings and deductions summary for all employees who left the enterprise, for a specified payroll and period. This generated pay slip report is then submitted to the National Tax Service (NTS).

**Separation Pay Tax Receipt Report (Payroll) (Korea)**

Run this report to generate the separation pay tax receipt for all employees who left the enterprise, for a specified payroll and period, and submit the generated report to the National Tax Service (NTS). The report contains detailed information like income tax and resident tax for received payments at the time the employee leaves the enterprise.

**Additional Wages CPF Capping Report (Payroll) (Singapore)**

The Additional Wages CPF Capping report shows whether an employee has overpaid or underpaid their Central Provident Fund (CPF) contributions on additional wages. Employees who have overpaid CPF are eligible to claim this amount from the Central Provident Fund Board.

**Payroll Statutory Deductions and Reporting****Archive P11D (HR, Payroll) (UK)**

Runs the Legislative Report Generator to generate details of Class 1A NICs for reporting to the Inland Revenue.

**Benefit in Kind Arrearage Report (Payroll) (Ireland)**

This report summarizes the outstanding PAYE and PRSI contribution amounts owed by employees, and the amounts that they have repaid for the current and previous financial years.

**Electronic Fund Transfer Report (Payroll) (India)**

Lists employee account and salary details to be submitted to bank, for electronic fund transfer.

**Employee Income Payment Detail Report (China)**

Contains detailed information for the summarized information provided in the Individual Income Tax Withholding report.

**Employee Listing (Hong Kong)**

List of current employees with information such as employee name, identity card number, passport number, work permit number and expiry date, and the date an employee joined the company.

**Employer Monthly Schedule Report (New Zealand)**

Lists the details of all employees and is submitted to Inland Revenue.

**ESI Form 6 (Payroll) (India)**

Generates the Form 6 that you would submit to the Employee State Insurance office at the end of contribution period. The report displays employee contribution details and ESI challan information, for the contribution period.

**FBT Report (Australia)**

Displays Fringe Benefits Tax information for a cost center.

**File-Tax Withheld Report (Payroll) (Japan)**

This notification file details the total income tax withheld from an employee's earnings. Created by the legal employer to send the relevant local government.

**Final Notice of Fixed Labor Insurance Fee Report (Payroll) (Japan)**

This is the total list of wages for employees with breakdown of each month, and is submitted by the business proprietor to the relevant Labor Standards Inspection Office in May.

**Final Settlement Report (Payroll) (India)**

The report is generated as a part of employee termination. The report displays employee's earnings and termination payments details.

**Form 3A Report (Payroll) (India)**

Generates the Form 3A report that you would submit to the Provident Fund office. The report displays employee's monthly provident fund contribution details.

**Form 6A Report (Payroll) (India)**

Generates the Form 6A report that you would submit to the Provident Fund office. The report displays employee's annual provident fund contribution details.

**Health Insurance Adjustment Report for Leaving Employees (Payroll) (Korea)**

The Health Insurance Adjustment for Leaving Employees report is run for all the employees leaving the enterprise and the report is then sent to National Health Insurance Corporation (NHIC). The report contains information such as the employees' previous year's income and the number of months the employee was employed in the enterprise.

NHIC uses this information to calculate and adjust the premium amount an employee must pay before leaving the enterprise.

**Health Insurance Premium Adjustment Annual Earnings Archive Process (Payroll) (Korea)**

Stores information about the employees' previous year's earnings and the number of months worked in the previous year, and to produce an E-file that will be sent to the National Health Insurance Corporation (NHIC).

**Individual Income Tax Withholding Report (China)**

Provides summarized information for all tax group rates separately.

**Inland Revenue Arrears Payment Report (New Zealand)**

Lists employees who are required to pay student loans or child support arrears to Inland Revenue.

**Inland Revenue Form IR21 (Payroll) (Singapore)**

Summarizes an employee's organization, personal details, and earnings and benefits in the two years prior to leaving the organization.

**Inland Revenue Remittance Certificate Report (New Zealand)**

Submitted to Inland Revenue by employers who are required to make PAYE payments, or employers who are Specified Superannuation Contribution Withholding Tax (SSCWT) payers.

**IR56B Report (Payroll) (Hong Kong)**

A statement of earnings for each employee used by the Inland Revenue to assess individual statements and forward an account to the employee for tax payable for the past financial year.

**IR56E Report (Payroll) (Hong Kong)**

Submitted for new hires, and includes information such as an employee's personal information, including their name, identification details, address, the employee's legal employer details and employment information.

**IR56F Report (Payroll) (Hong Kong)**

A notification by the employer about an employee who is leaving the enterprise but intending to stay in Hong Kong.

**IR56G Report (Payroll) (Hong Kong)**

A notification by the employer about an employee who is leaving the enterprise and also departing from Hong Kong.

**IRP5 Tax Certificate (Payroll) (South Africa)**

Tax certificates for employees who have paid tax during this tax year.

**IT3(a) Tax Certificate (Payroll) (South Africa)**

Tax certificates for employees who have paid no tax during this tax year.



**Local Tax Withheld Report (Payroll) (Japan)**

This report details the total income tax withheld from an employee's earnings. The amount of tax withheld is forwarded by the legal employer to the relevant local government.

**Kuwait Payroll Register Report (Payroll) (Kuwait)**

You can review payroll run results for each employee by running the Kuwait Payroll Register report.

**Legislative Reports Generator (Payroll) (Ireland)**

Run the generator to enable you to report the payroll data for the P30, P35, P60, and the Payslip Advice reports within a specific date range.

**MPF Remittance Report (Payroll) (Hong Kong)**

A contribution report submitted to the Mandatory Provident Fund (MPF) Trustee detailing contributions for the period.

**National Pension Adjustment Annual Earnings Archive Process (Payroll) (Korea)**

Stores information about the employees' earnings and the number of months worked in the previous year, and to produce an E-file that will be sent to the National Pension Corporation (NPC)

NPC uses this information to recalculate the pension and notify the enterprise about the new pension due for the current year.

**National Pension Adjustment Report (Payroll) (Korea)**

The National Pension Adjustment report is run for all the employees whose status has changed (newly hired or terminated workers) since the last report, and then send the report to the National Pension Corporation (NPC).

The NPC uses this information to calculate and adjust a new premium for the worker.

**National Service In-Camp Training Computation (Payroll) (Singapore)**

Calculates the pay amount that an employer can claim from the Ministry of Defence for an employee who is attending mandatory National Service In-Camp Training.

**Notification Change Address for National Pension Type 3 Insured Report (Payroll) (Japan)**

This notification is submitted by the business proprietor to the social insurance office when an employee's insured dependent's (=National Pension Type 3rd insured's) address is changed.

**Notification to Change Address for Welfare Pension Insurance Report (Payroll) (Japan)**

This notification is submitted by the business proprietor to the social insurance office when an insured employee's address is changed.

**P30 Report (Payroll) (Ireland)**

PAYE and PRSI information for issue to the tax office each calendar month.

**P35 Report (Ireland)**

PAYE and PRSI information for all employees including leavers for issue to the tax office at the end of the tax year.

**P45 Alignment Report (Payroll) (UK)**

Draft printer alignment for P45 reports.

**P45 Report (Payroll) (UK)**

P45 details for terminated employees for issue to the tax office and the leaver; P45 details for current employees for issue to different tax offices.

**P45(3) & P46 Exceptions Report (UK)**

Enables you to identify those employees for whom a P45(3) or P56 has not been created, yet have been paid since their initial hire date.

**P46 (P160) Pension Notification (UK)**

Enables you to provide information on recipients of taxable pensions, and those gaining extra income while collecting a pension.

**P60 Report (Payroll) (Ireland)**

P60 details for employees employed by the business at the end of the tax year.

**Payroll Report (Notification for Geppen) (Payroll) (Japan)**

This notification is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums are changed without waiting for the following regular determination because of rise in pay etc.

**Payroll Report (Notification for Santei) (Payroll) (Japan)**

This notification is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums in and after October of the year are determined based on their earnings.

**Payroll Report (Notification of Deduction for Dependents) (Payroll) (Japan)**

This notification details employee's dependents so that he/she can receive deduction of a tax reduction for spouses, allowance for dependent, credit for handicapped person, etc. The legal employer receives this from employees before YEA period and must keep this in case the tax authority asks to present.

**Payroll Report (Notification of Deduction for Ins Premiums, Spouse) (Payroll) (Japan)**

This notification details employee's premiums of life and nonlife insurances so that he/she can receive insurance premium deduction and special exemption for spouse. The legal employer receives this from employees before YEA period and must keep this in case the tax authority asks to present.

**Payroll Report (Notification of Dependents for Health Insurance / Notification of Type 3 Insured for National Pension) (Payroll) (Japan)**

This notification is submitted by the business proprietor to the social insurance office when the details of insured employee's dependents is changed.

**Payroll Report (Notification of Disqualification for Health Ins/Welfare Pension Insurance) (Payroll) (Japan)**

This notification is submitted by the business proprietor to the social insurance office when the insured employee loses qualification because of some reason like termination, and death.

**Payroll Report (Notification of Qualification for Health Ins/Welfare Pension Insurance) (Payroll) (Japan)**

This notification is submitted by the business proprietor to the social insurance office when the person applicable to Article 9 of Welfare Pension Insurance Law or the 10th article is employed.

**Payroll Tax Remittance Report (Payroll) (Mexico)**

The Tax Remittance Report (TRR) provides summary-level information to reconcile the wage and tax amounts for a period. It provides proof of sufficient payment when an employer is remitting their tax payments to the various Mexican governmental agencies. It lists the wages the employer has paid during the time period and the taxes due based on those wages.

**Pension Form 7 Report (Payroll) (India)**

Generates the Form 7 report that you would submit to the Provident Fund office at the end of each financial year. The report displays employee's monthly provident fund contribution information for a financial year.

**Pension Form 8 Report (Payroll) (India)**

Generates the Form 8 report that you would submit to the Provident Fund office. The report is generated for exempted provident fund trusts. The report displays employee's monthly provident fund contribution details.

**PIFSS Report (Payroll) (Kuwait)**

This report displays monthly social insurance contributions and deductions to PIFSS.

**Quarterly Employment Survey (New Zealand)**

Extracts information to enable the Statistics New Zealand quarterly employment survey to be completed.

**Report on Hirings (Canada)**

You submit this monthly report to Human Resources Development Canada (HRDC) as part of a government insurance program designed to deter and detect overpayments.

**Report 166 (Payroll) (Kuwait)**

This report reflects the monthly contribution of the employer and employee to PIFSS.

**Report 167 (Payroll) (Kuwait)**

This report displays the details of the additional social insurance installments that PIFSS requests employers to deduct from employees.

**Report 168 (Payroll) (Kuwait)**

This report displays the employee's movements during a month. The report lists the employees who joined the service, left the service, or moved to a higher salary grade, during the month.

**Salary Payment Summary Report (Payroll) (Japan)**

This report details the total income tax withheld from all employees' total earnings. The amount of tax withheld is forwarded by the legal employer to the relevant local government.

**Saudi Monthly Contributions Report (Payroll) (Saudi Arabia)**

Use this report to create a list of employers' (on behalf of employees) contributions to GOSI for the contributory month. This enables the GOSI office to keep track of employee head count and their contributions to GOSI.

**Saudi New and Terminated Workers Report (Payroll) (Saudi Arabia)**

Use this report to provide monthly updates to the GOSI office about new and terminated employees for the specified month.

**Saudi Workers Movement Report (Payroll) (Saudi Arabia)**

Use this report to create a list of employees' movement for the specified month. This enables the GOSI office to keep track of newly hired employees, (with and without GOSI number) and terminated employees.

**Si FD Report (Payroll) (Japan)**

This is a request set to execute line#2-#6 at once.

**Statutory Deduction Adjustment Information - Upload Process (Payroll) (Korea)**

You upload payroll adjustment information sent by the National Pension Corporation (NPC) and the National Health Insurance Corporation (NHIC) by uploading the text file and placing it in a directory where it can be read by the upload process. The application reads the data and loads into the Batch Element Entry (BEE) tables. These agencies send your enterprise these details as a text file.

**State Quarterly Error Report (Payroll) (US)**

The State Quarterly Error report checks the data archived by the State Quarterly Wage Listing report. It generates a list of assignments that have negative balances, which could cause the State Quarterly Wage Listing report to fail.

**State Quarterly Wage Listing (Payroll) (US)****Summary of Tax Certificates (Payroll) (South Africa)**

Summary of totals for each SARS code per preprocess.

**Superannuation Contribution Report (Australia)**

Identifies monthly figures for superannuation salary and employer superannuation guarantee contributions.

**Tax Certificate Number Report (Payroll) (South Africa)**

Lists the generated tax certificate numbers and their assignment details, and the number of tax certificates issued and reissued.

**Tax Form Audit Report (Payroll) (US)**

This report checks the changes employees make through Self Service.

**Tax Form Exceptions Report (Payroll) (US)**

This report checks for employees who have made 10 or more exemptions.

**Tax Office Report for Manual Completion (Netherlands)**

Enables you to generate the tax office report, print it out, and manually complete the remaining sections before sending it out to your tax office.

**Tax Payments Listing (Payroll) (UK)**

Details of employees' PAYE and National Insurance deductions.

**Tax Register Report (Payroll) (South Africa)**

Tax-related information and balances for current employees and ex-employees.

**Tax Withheld Report (Payroll) (Japan)**

This report details the total income tax withheld from an employee's earnings. The amount of tax withheld is forwarded by the legal employer to the relevant Japanese tax authority.

**Total Income Tax Withheld Report (Payroll) (Japan)**

This report details the total income tax withheld from all employees' total earnings. The amount of tax withheld is forwarded by the legal employer to the relevant Japanese tax authority.

**Unacceptable Tax Balance Report (Payroll) (US)**

The Unacceptable Tax Balance report identifies employees with potential incorrect withheld amounts for the following taxes:

- Federal Income Tax (FIT)
- State Income Tax (SIT)
- Local Income Tax (LIT)
- Social Security
- Medicare
- FUTA
- SUI

- SDI

### **Wage Report (Payroll) (Netherlands)**

Use the Wage report to provide various payroll information to the tax authorities periodically.

## **Payroll Processing and Analysis**

### **1099R Exception Register (Payroll) (US)**

Identifies employees who: have negative box 1 totals on the Form 1099-R, or have a zero box 1 total on the Form 1099-R, but have other negative 1099-R box totals.

### **1099R Forms (Payroll) (US)**

Provides for printing of retiree 1099-R at an individual level as well as all employees in a GRE.

### **1099R Information Return (Payroll) (US)**

Allows printing a single 1099-R or a range of 1099-Rs that you define. Sort options give you further flexibility in 1099-R distribution.

### **1099R Register (Payroll) (US)**

Allows viewing the amounts reported in each box of the Form 1099-R for all employees in a particular GRE for a given year.

### **1099R Register Totals (Payroll) (US)**

You can choose to view only the box totals for all selected employees in the report; individual employees will not be included in the report. Or you can choose to view box totals in the report for selected individual employees, as well as the totals for these employees.

### **Advance Pay Listing (Payroll)**

Details of the advance pay periods for employees due to receive advance pay.

### **Alien Retro Benefits Loss (Payroll) (US)**

The Alien Retro Benefits Loss report identifies employees who have earned treaty benefits that are then revoked.

### **Alien Retro Benefits Projection (Payroll) (US)**

The Alien Retro Benefits Projection identifies employees who are earning alien tax treaty benefits that could be subject to a retroactive loss at some point in the future.

### **Annual FUTA Tax Return (Payroll) (US)**

Oracle Payroll provides certain information in the form of a work sheet that you then transcribe to the official form 940; however, some information must be provided by you.

**Annual Unemployment Insurance (Form 940) Information (Payroll) (US)**

Provides numbers for annual 940 filing.

**Audit Report (Payroll)**

Selects person, employee or applicant, assignment, element, recurring or non-recurring status. Shows Business Group, GRE (US only), assignment details, person entering data (responsibility), input date, effective change date, details of person affected. Lists all fields changed, with input date and effective date, old value and new value, responsibility, workstation address.

**Business Payrolls Survey (Payroll) (Canada)**

The Business Payroll Survey (Survey of Employment, Payrolls and Hours) is a monthly report that is requested by Statistics Canada. It provides statistical information on the total number of hourly and salaried employees paid, hours worked, earnings, and payrolls at industrial, provincial, and territorial levels.

**Canadian Deposit Advice (Payroll) (CA)**

The Canadian Deposit Advice report produces deposit advices with attached statements of earnings.

**Cost Breakdown Report for Costing Run (Payroll)**

Summarized costing totals for an individual costing.

**Cost Breakdown Report for Date Range (Payroll)**

Summarized costing totals for all costing runs within a given date range.

**Deductions Report (Payroll) (Canada, *Oracle HRMS Payroll Processing Management Guide*, US, *Oracle HRMS Payroll Processing Management Guide*)**

Use the Deductions report to show any non-tax Payroll deduction details.

The Deductions report always shows details for each run within the selected time frame by deduction classification, deduction type, and employee information. This information can be sorted by GRE, Location, or Organization.

**Earnings Audit (Payroll) (US)**

Report detailing all employees with a particular element being processed in a given pay period.

**Electronic File Transfer (Payroll) (Kuwait)**

Oracle HRMS enables you to submit employee and payment details to the bank in the form of a bank transfer file.

**Employee Assignments Not Processed (Payroll)**

Produces a list of all unprocessed employee assignments arranged according to sort criteria that you specify.

**Element Register (Payroll)**

Use the Element Register report after a payroll or QuickPay run to display a listing of the elements and pay values for each employee. You can specify a report output type for browser display, or for export to an editable spreadsheet.

**Element Result Listing (Payroll)**

Run results processed for a particular element over a defined period, and run results for selected input values of each employee's last assignment process.

**Employee Payroll Movements Report (Payroll)**

New hires, terminations, transfers in and transfer out of a selected payroll.

**Employee Run Results (Payroll) (CA, US)**

Users may select various elements for the various time frames, assignment of GREs. The report shows the run results for selected information by pay period.

**Employee Run Results Summary Report (Payroll) (UK)**

Includes all assignments, gross pay, PAYE, employee's NI contribution, employer's NI contribution, other deductions, total deductions, net pay and total pay for the payroll.

**Employee W2 Report (Payroll) (US)**

Creation of Federal W-2 paper report and summary totals.

**Employee W2 XML Interface (Payroll) (US)**

Export employee W-2s into PDF format.

**Employees Not Paid (Payroll)**

The Employees Not Paid Request Set combines three reports to help you identify employees who have not received a paycheck in a time period you specify:

- Employee Assignments Not Processed
- Employees Without Payrolls
- Payroll Message

**Employer W2 to be filed with the state (Payroll) (US)**

Creation of employer W-2s to be filed with the state.

**Federal 1099R Magnetic (Payroll) (US)**

Creation of Federal 1099-R magnetic media.

**Federal and State Tax Remittance Reporting (Payroll) (US)**

This report shows the federal and state balances summarized for a particular range of check dates.

**Federal W-2 Magnetic Media (Payroll) (US)**

Creation of Federal W-2 magnetic media and summary totals.



**Federal W-2C Magnetic Media (Payroll) (US)**

Run Federal W-2C Magnetic Media to report W-2 corrections on magnetic media (in MMREF-2 Format) for all open assignments not marked by the Mark Paper W-2c and Exclude From Future Tapes process.

**GRE Totals (Payroll) (US)**

Reconciliation report to be used to assist in period end processing balancing purposes. This report shows Federal and State level taxable balances and withholdings.

**IR8S Ad Hoc Printed Archive Report (Payroll) (Singapore)**

Generates an IR8S report for validation purposes, before submitting the report to the IRAS.

**ISR Tax Format 37 (Payroll) (Mexico)**

The Federal Institution (SAT) requires that employers provide the Certificate of Wages, Salaries, Travel Expenses, Assimilated Concepts, and Credit to Salary report (Format 37) to employees at the following times:

- Within 30 days of an employee's separation from the employer (voluntary or involuntary)
- Annually at end-of-year for all employees

**Note:** Some employers may opt to provide Format 37 reports to only those employees that earn 300,000 pesos a year or more. Employees that earn less than 300,000 pesos a year can obtain a Format 37 report by submitting a request in writing.

Oracle HRMS provides the ISR Tax Format 37 concurrent process to generate your Format 37 reports as a PDF file. ISR Tax Format 37 uses the XML Publisher functionality to convert the data archived by the Year End Archiver into the PDF output; therefore, you must have completed the archival process before running ISR Tax Format 37.

**Local Tax Remittance Reporting (Payroll) (US)**

This report shows the local tax balances summarized for a particular range of check dates.

**Local W-2 Magnetic Media (Payroll) (US)**

Creation of local W-2 magnetic media and summary totals.

**Multiple Assignments Report (Payroll) (UK)**

Lists employees who have been marked for multiple assignment processing and indicates where Priority Processing Type is not set and cannot be defaulted.

**Multiple Worksite Report (US)**

Reports on wages and locations of employees in all the multiple locations across all SUIs and other GREs.

**NACHA (magnetic media) (Payroll) (US)**

Provides for creation of employee NACHA information to be submitted.

**NACHA Report (Payroll) (US)**

Detail of employee NACHA information.

**Over Limit Reporting (Payroll) (US)**

The Over Limit Report identifies employees who have had taxes withheld in excess of the legal limit.

**Pay Advice Alignment Report (Payroll) (UK)**

Draft printer alignment for your sample pay advice.

**Payment Output File (Payroll) (Kuwait)**

Oracle HRMS provides this process to generate the electronic file.

**Payment Register (Payroll) (South Africa)**

Payment elements per employee.

**Payment Register Detail and Summary Reports (Payroll) (US)**

The Payment Register Detail report shows for each employee, the employee number, deposit advice or check/cheque number, bank number and name, transit code, account number, and payment amount. The Payment Register Summary report shows total amounts paid for a payment method and type by GRE.

**Payment Report (Payroll) (Canada)**

The Payment Report provides users with the ability to reconcile their payments with other reports. Through this report, users can view the employee-level details with their payments. It displays all payments made to employees based on the consolidation set, period start date, and period end date. It displays all employee payments within a GRE, payroll, payment type, or payment method that are paid in each pay period.

**Payment Summary Self Printed Report (Payroll) (Australia)**

This report enables employers to self print payment summaries on plain paper. This feature is only available to employers who submit their Payment Summary data to the ATO electronically.

**Payment Summary Validation Report (Australia)**

This report obtains all information from the archive tables and can be run several times in a year, against archived data, for data validation. The report lists details that are normally printed on the Payment Summary.

**Payments Register Report (Payroll) (US)**

This report shows for each employee:

- Assignment number
- Payment type
- Deposit advice or check number
- Payment amount

- Bank name, account number, and account type

#### **Payments Register Summary Report (Payroll) (US)**

The Payments Register Summary report shows total amounts paid for a payment type by GRE.

#### **Payments Summary Report (Payroll) (UK)**

Payments totalled by payment method type and organizational payment method for a specified payroll and payroll period. Account details for each organizational payment method are also listed.

#### **Payroll Actions Not Processed (Payroll) (US)**

The Payroll Actions Not Processed report identifies assignments that were not included in either the Payroll Archive or the Periodic Tax Filing FLS Interface. Once identified, you can use the information in the report to troubleshoot these exceptions and then rollback and rerun processes as appropriate.

#### **Payroll Activity Report (Payroll) (US)**

The Payroll Activity report shows employee and group level payroll details.

#### **Payroll Message Report (Payroll)**

Display messages for processes connected to specified payrolls.

#### **Payroll Reconciliation Payment Summary Report (Australia)**

Generates payroll reconciliation for end of year processing and for all the legal employers in that period.

#### **Payroll Reconciliation Detail Report - Payment Summary Mode (Australia)**

Generates details of the payments made to employees in the financial year for a legal employer and enables easier end of year reconciliation.

#### **Payroll Reconciliation Summary Report (Australia)**

Generates payroll reconciliation summary report for a specific payroll or quick-pay run, or for a specific period.

#### **Payroll Reconciliation Report (New Zealand)**

Generates a payroll reconciliation for a specified payroll period.

#### **Payroll Register (Payroll) (US)**

Payroll Register Reporting is used to show employee and group level payroll details

#### **Payroll Register Report CA (Payroll) (Canada)**

The Payroll Register Report CA request set shows employee and group level details. It consists of two reports:

- Payroll Register Report
- Payroll Register Totals Report

**Payroll Tax Report (Australia)**

Run this report to generate a payroll tax report detailing employer's liability for payroll tax contributions for a specified month and for a specified Australian state. You must run your payroll before running this report.

**Provincial Footnote Report (Payroll) (Canada)**

The Quebec government requires that footnotes appear on RL-1 and RL-2 Slips in certain situations. Oracle Payroll prints one footnote on the slips. If there is more than one footnote required, "See attached" appears on the slips and the footnotes appear on a footnote report. Run this report to generate those footnote slips.

**Provincial Medical Report (Payroll) (Canada)**

The Provincial Medical Report details the required information to remit employer premiums for provincial medical for those provinces that require it.

**Quebec Health Services Fund (Payroll) (Canada)**

The Quebec Health Services Fund Report details the required information to remit employer premiums for the Quebec Health Services Fund.

**Retro-Notifications Report (RetroPay)**

Generates an assignment set containing retroactive changes applying to a period for which payroll processing has already taken place.

**Retro-Notifications (Enhanced) Report (RetroPay)**

Use this report to:

- Identify all retrospective changes that have occurred since the last payroll run.
- Automatically save these changes into an assignment set, or as an event, depending on which Retro-Notifications report you use in your localization.
- Produce a report (.a01) that lists the employees included in the assignment set and the trigger event that included them. You can view this output through Concurrent Manager by choosing the View Output button.

**RL1 Amendment Paper Report (Payroll) (Canada)**

Amended RL-1s are printed on the standard RL-1 slip but have "Amended" printed at the top along with the original RL-1 slip number.

**RL1 Amendment Register Report CA (Payroll) (Canada)**

The amendment register displays all employees who were modified after the Provincial Year End Preprocess was run for that reporting year.

**RL1 Electronic Interface (Payroll) (Canada)**

Generates the RL-1 Slip for electronic submission.

**RL1 Paper Report (Payroll) (Canada)**

Generates the RL-1 Slip for paper submission.

**RL1 Register Report CA (Payroll) (Canada)**

The RL1 Register Report allows you to preview the amounts reported in each box of the RL-1 Slip for all employees in a particular PRE for a given year. The RL1 Register Report shows totals by RL-1 box. You can use the RL1 Register Report to verify your RL-1 box totals prior to running your RL-1 Slips.

**RL2 Amendment Paper Report (Payroll) (Canada)**

Amended RL-2s are printed on the standard RL-2 slip but have "Amended" printed at the top along with the original RL-2 slip number.

**RL2 Amendment Register Report CA (Payroll) (Canada)**

The amendment register displays all employees who were modified after the Provincial Year End Preprocess was run for that reporting year.

**RL2 Electronic Interface (Payroll) (Canada)**

Generates the RL-2 Slip for electronic submission.

**RL2 Paper Report (Payroll) (Canada)**

Generates the RL-2 Slip for paper submission.

**RL2 Register Report CA (Payroll) (Canada)**

The RL2 Register Report allows you to preview the amounts reported in each box of the RL-2 Slip for all employees in a particular PRE for a given year. The RL2 Register Report shows totals by RL-2 box. You can use the RL2 Register Report to verify your RL-2 box totals prior to running your RL-2 Slips.

**Run Balance Architecture Diagnostic (Payroll) (US)**

Use the Run Balance Architecture Diagnostic report to assist you in identifying problems with your balance reporting setup.

**ROE Worksheet (Payroll) (Canada)**

Generates a preview of the actual ROE for review.

**Saudi Payroll Register Report (Payroll) (Saudi Arabia)**

Use this report to create payroll information for each employee for each payroll period, and store information for payroll verification, validation, and auditing purposes.

**State 1099R Magnetic Report (Payroll) (US)**

Creation of State 1099-R magnetic media.

The State 1099R Magnetic Report request parameters are similar to the Federal parameters, except they contain a State parameter.

**State W-2 Magnetic Media (Payroll) (US)**

Creation of state W-2 magnetic media and summary totals.

**Statutory Deduction (Payroll) (Canada)**

Consolidates and lists the kinds of moneys the employees and employers submit to the government as taxes. This report shows the federal and provincial tax balances summarized for a particular range of pay dates.

The Provincial section of this report includes only the provinces that have separate provincial taxes.

**T4 Amendment Paper Report (Payroll) (Canada)**

Run the T4 Amendment Paper Report after you have run the Federal Year End Amendment Preprocess and the T4 Amendment Register Report.

**T4 Amendment Register Report CA (Payroll) (Canada)**

The amendment register displays all employees who were modified after the Federal Year End Preprocess was run for that reporting year.

**T4 Magnetic Media (Payroll) (Canada)**

Generates the T4 Slip for electronic submission.

**T4 Paper Report (Payroll) (Canada)**

Generates the T4 Slip for paper submission.

**T4 Register Report CA (Payroll) (Canada)**

Use the T4 Register Report to view the amounts reported in each box of the T4 Slip for all employees in a particular GRE for a given year. The T4 Register Totals Report shows totals by T4 box number. You can use the T4 Register Report to verify your T4 box totals prior to running your T4s.

See T4A Year End Slip, *Oracle HRMS Payroll Processing Management Guide*

**T4A Amendment Paper Report (Payroll) (Canada)**

Run the T4A Amendment Paper Report after you have run the Federal Year End Amendment Preprocess and the T4A Amendment Register Report.

**T4A Amendment Register Report CA (Payroll) (Canada)**

The amendment register displays all employees who were modified after the Federal Year End Preprocess was run for that reporting year.

**T4A Magnetic Media (Payroll) (Canada)**

Generates the T4A Slip for electronic submission.

**T4A Paper Report (Payroll) (Canada)**

Generates the T4A Slip for paper submission.

**T4A Register Report CA (Payroll) (Canada)**

Use the T4A Register Report to view the amounts reported in each box of the T4A slip for all employees in a particular GRE for a given year. The T4A register report shows totals by T4A box number. Using sort options, you can customize this report to further

display withholding totals for employees, organizations, and locations. You can use the T4A Register Report to verify your T4A box totals prior to running your T4As.

See T4A Year End Slip, *Oracle HRMS Payroll Processing Management Guide*

### **TIAA-CREF Transmission Report (Payroll) (US)**

### **UIF Report (Payroll) (South Africa)**

Employee and employer contributions made to the Unemployment Insurance Fund.

### **W-2 Forms (Payroll) (US)**

Prints employee W-2s at an individual level, thus allowing W-2s to be created as employees terminate, or for an entire GRE.

### **W2 Exception Register (Payroll) (US)**

The W2 Exception Register request set identifies employees who have negative box 1 totals on the Form W-2, or have a zero box 1 total on the Form W-2, but have other negative W-2 box totals.

### **W2 Puerto Rico (Payroll) (US)**

Generate forms 499R-2/W-2PR to provide the annual withholding statement to employees in Puerto Rico.

### **W2 Register (Payroll) (US)**

Run the W2 Register to view the amounts reported in each box of the Form W-2 for all employees in a particular GRE for a given year.

### **W-2C Report (Payroll) (US)**

Generate one or more Form W-2Cs for paper distribution.

### **Workers Compensation Assessable Wages Report (Payroll) (Canada)**

The Workers Compensation Assessable Wages Report details the required information to remit employer premiums for WCB.

### **Year End Adjustment e-File Report (Payroll) (Korea)**

The generated report is about Year End Adjustment, based on the year end balance adjustment and archive process to view, and print the report, and store it on magnetic tape, and send the generated magnetic file to the local tax offices upon their request.

### **Year End Adjustment Ledger Report (Payroll) (Korea)**

Generates the YEA Ledger using Oracle Reports for all three YEA types, Normal, Interim and Re. You can generate the ledger using three different criteria:

- Business Place
- Payroll Action
- Assignment Action

**Year End Adjustment Reclaim Sheet (Payroll) (Korea)**

Generates a record with details about YEA tax exemptions and deductions. Oracle Payroll bases this information on the date the employer enters in the Year End Adjustment Information window. The enterprise uses it to claim YEA and keeps the record as documentation for National Tax Services.

**Year End Adjustment Tax Receipt Report (Payroll) (Korea)**

Generates a YEA tax receipt with details like housing pre-tax deduction and insurance exemption for a particular payroll action, business place or an assignment set.

**Year End Adjustment Tax Summary Report (Payroll) (Korea)**

View the summarized YEA tax details for a business place and period in the generated report.

**Year End Adjustment Medical Expense E-file Report (Payroll) (Korea)**

The generated report includes detailed medical expenses of those employees whose medical expenses are KRW 2,000,000 or more. The enterprise can view, and print the report, and store it on magnetic tape, and send the generated magnetic file to the local tax offices upon their request.

**Year End Adjustment Donation e-File Report (Payroll) (Korea)**

This e-File report includes detailed donation expenses of those employees whose donation exemptions are more than the specified limit. You can view, print, and store the report on magnetic tape, and send the generated magnetic file to the National Tax Service upon request.

**Year End Archive Missing Assignments Report (Payroll) (US)**

This report identifies employees who were not picked up by the Year End Preprocess but are now eligible for processing. This report adds these missing employees to an assignment set. You run the Add Assignment Actions to Year End Preprocess process to archive those missing employees into the Year End Preprocess.

**Year End Archive Missing Assignments Report CA (Payroll) (Canada)**

This report identifies employees who were not picked up by the Year End Preprocess but are now eligible for processing. This report adds these missing employees to an assignment set. You run the Add Assignment Actions to Year End Preprocess process to archive those missing employees into the Year End Preprocess.

**Year End Exception Report (Payroll) (Canada)**

This report provides the necessary information to prevent or respond to the PIER (Pensionable and Insurable Earnings Review) Report issued by the Canada Revenue Agency (CRA) and the Employee and Employer Contribution Report issued by the Ministère du Revenu subsequent to the filing of year end forms.

**Year End Negative Balance Reports (Payroll) (US)**

Report listing any negative balances found due to user adjustments or conversion issues.



## Payroll Event Rules

### Void Payments (Payroll)

Details of cancelled cheque payments

### Void Payments Report (Payroll) (US)

The Void Payments report shows details of voided payments. Currently, the report shows details of cancelled check payments only.

## Deploy Self Service Capability

### Notification of Personnel Action (SF 50) (Federal)

Prints the standard Notification of Personnel Action for an approved Request for Personnel Action

### Request for Personnel Action (SF-52) (Federal)

Prints the contents of the employee's Request for Personnel Action

## Workforce Intelligence

### Dutch Assignment SCL FLExfield Upgrade Report (Netherlands)

Run this report to view the information removed and moved by the Dutch Assignment SCL Flexfield upgrade script.

## Processes

### A8A File (Payroll) (Singapore)

Creates a file that includes the details of any benefits-in-kind provided to your employees, for example, car-related benefits, or the cost of running a fax machine. The process also creates a report for you to view the contributions that are included in the file.

### A8B File (Payroll) (Singapore)

Creates a file that records details of any stock options granted to an employee, and any stock options exercised during a financial period.

### ACB Process (Payroll) (South Africa)

Setting up and running ACB.

### Add Assignment Actions to Year End Preprocess (Payroll) (Canada, US)

After you have run the Year End Archive Missing Assignments Report, run this process to archive the missing employees into the Year End Preprocess.

See Year End Preprocess, *Oracle HRMS Payroll Processing Management Guide*

**Adjust Run Balance Dates (Payroll) (US)**

The Adjust Run Balance Dates concurrent process moves the date for the valid run balances backwards or forwards.

**Advance Pay (Payroll)**

Allows you to pay employees in advance for holidays or other events.

**Advance Pay Batch Setup (Payroll) (South Africa)**

Advance Pay Batch Setup.

**Advance Pay by Element (Payroll)**

Run the Advance Pay by Element process from the Submit Requests window. This process may not be available for all legislations.

**Annual and Long Service Leave Liability Process (Australia)**

Extracts information used in the Leave Liability Report.

**ASB CSV Direct Credit Process (New Zealand)**

Details of all employees that use the direct credit as the payment method.

**Audit Trail Update Datetracked Tables Process**

This process is used to set up audit trail on selected datetracked tables.

**Audit Trail Update Tables Process**

This process is used to set up audit trail on selected tables.

**BACS Process (Payroll) (UK)**

Summarized totals for BACS tape amounts including consolidated totals for multi-day and multi-file formats.

**Bank Transfer Report (Payroll) (Korean)**

This report produces a deposit advice in the correct format. This process generates two outputs, a hard copy and a magnetic file for submission to the bank. Once you transfer the advice to the bank, the bank deposits the payments directly into the worker's account.

**Batch Print Notification of Personnel Action (Federal)**

Prints Notifications of Personnel Action (SF-50s) in batch mode.

**BEE Batch Process (Purge)**

This process is used to delete a batch from the BEE tables on completion of the concurrent request.

**BEE Batch Process (Rollback)**

This process is used to completely remove a BEE transfer, provided you have not purged the batch from the BEE tables

**BEE Batch Process (Transfer)**

This process is used to create element entries in the Oracle HRMS Entries table from the existing entries in the BEE temporary tables.

**BEE Batch Process (Validate)**

This process is used to test each batch line against predefined rules about element entries, and against any additional validation procedures that you have created.

**Bulk Compile Formulas**

Run this process to compile all of your formulas.

**Calculate Assignment Budget Values**

Run this process to recalculate and update derived Assignment Budget Values (ABV), such as Full Time Equivalent and Percent Full Time Equivalent.

**Calculate Commitment**

Run this process to calculate the projected expenditures for a budget over a given period. You can calculate commitments for an entire budget or for a single position in a budget.

**Calculate FTE for Assignments page (UK)**

This process is used to populate the Assignment Budget Window with FTE values.

**Canadian Cheque Writer (Payroll) (Canada)**

The Canadian Cheque Writer process produces pay cheques with attached statements of earnings (SOEs).

**Canadian Payroll Archiver (Payroll) (Canada)**

The Payslip uses data archived by the Canadian Payroll Archiver process. You run this process after each payroll period to enable Self Service users to view their current Payslip.

**Canadian Process Payroll Run (Payroll) (Canada)**

Initiates a Canadian payroll run.

**Cash Process (Payroll) (UK)**

Enables you to use cash as a payment method and record cash payments to employee assignments.

**CDV Bank Name User Table Setup (Payroll) (South Africa)**

Creates the CDV Bank Name User Table.

**CDV Data Load Process (Payroll) (South Africa)**

Loads CDV data.

**Change Candidate Access for Security Profiles (iRecruitment)**

Run this process to update your security profiles to include or exclude candidates.

**Change Person Numbering to Automatic**

Run this process to change the method by which you identify your employees from manual to automatic number generation

**Check Date Setup (Federal)**

Run this process when the pay date does not correspond to the pay period end date.

**Check Writer - Override Payment Date (Payroll) (US)**

Use the override check date feature to override the check date and print a check with a check date of your choice.

**Check Writer Process**

Cheque/Check Writer process to determine the generation of cheques/checks for a specified payroll and consolidation set over a specified time period.

**Check Writer Process (Payroll) (US)**

This process is used to write sequences of checks for your payroll run.

**Cheque Writer Process (Payroll)**

This process is used to write sequences of cheques for your payroll run.

This process is used to populate the Assignment Budget Window with FTE values.

**Cheque Writer Process (Payroll) (South Africa)**

Produces cheque payments.

**Cheque Writer (Mexico) (Payroll) (Mexico)**

This process is used to write sequences of cheques for your Mexican payroll run.

**Cheque/Check Writer (Generic) Process (Payroll) (India, Mexico)**

Use the generic Cheque/Check writer process in preference to the non-generic process if you want to produce output in XML format.

**Cheque/check Writer - Override Payment Date (Payroll) (US)****Child Sequence Generator Process (Germany)**

This process generates the sequence number for children. The sequence number is used in the calculation of the local cost-of-living allowance.

**Clear SUI Wage Base Overrides (Payroll) (US)**

This process checks that the proper SUI tax records exist.

**Close Action Items Process (Advanced Benefits)**

Run this process before the Close Enrollments Process to close any open action items that are required or optional for the persons you select.

**Close Enrollments Process (Advanced Benefits)**

Run this process to close a person's enrollment after elections have been made.

**Collective Agreement Entitlement Evaluation**

Run this process to evaluate and apply collective agreement entitlements for an employee.

**Commitment GL Posting**

You run the Commitment GL Posting batch process to transfer budget commitments from Oracle HRMS to Oracle General Ledger.

**Communications Triggers Process (Advanced Benefits)**

Use the communications triggers process to generate communications for persons who meet the selection criteria that you specify.

**Compensation Workbench Back-Out Life Events Process**

Run this process to remove the results of the Participation Process: Compensation for a life event associated with Compensation Workbench.

**Compensation Workbench Close Enrollment Process**

Run this process to close the life event for a Compensation Workbench plan.

**Compensation Workbench Mass Notification Process**

Run this process to generate approval notice and other notifications.

**Compensation Workbench Post Process**

Run this process *after* all worksheet allocations have been approved.

**Compensation Workbench Refresh Process**

Run the Compensation Workbench Refresh Process to refresh employee or plan design data in Compensation Workbench.

**Continuous Calculation (Payroll)**

The Continuous Calculation process enables you to process static employee data throughout a payroll period.

**Costing Process (Payroll)**

Generates journal entries for your ledgers and costing information relating to labor costs.

**Costing of Payments (Payroll)**

Enables easier accounting for your reconciliations by creating your reconciliation accounting entries in one automatic operation rather than a series of manual updates.

**CPFLine (Payroll) (Singapore)**

Creates a file that you submit each month to the CPF Board for every legal entity in your enterprise. The report that is produced enables you to view the CPF contributions that are included in the file

**Create and Maintain Company Cost Centers with Existing Organizations**

This process creates company cost center organizations for each unique company cost center combination that has been defined in GL. This process is also available as part of the Synchronize GL Company Cost Centers with HR request set.

**Create Federal HR Valid Combinations for the Grade KF (Federal)**

Federal Concurrent Manager process that supplies the predefined valid grade and pay plan combinations for the grade key flexfield.

**Create Federal Special Info Types (Federal)**

Federal Concurrent Manager process that supplies the Federal Special Information types for the Person Special Information.

**Credit Transfer Cheque Payments Process (Payroll) (South Africa)**

Produces an aggregated cheque per bank branch to be submitted with Deposit Schedules.

**Credit Transfer Process (Payroll) (South Africa)**

Marks employees with this payment method as paid.

**Danish Payment File (PAY)**

This concurrent program generates the PBS file to be sent to the bank. The application retrieves data for a Service Provider or a Legal Employer depending on the value of the parameter, Data Supplier Type.

**Danish Postal Code Upload (HR)**

This concurrent program uploads the postal code details to the postal code lookup so that the user can select a postal code from the lookup.

**Danish Tax Card Requisition (PAY)**

This concurrent program retrieves the employee information for the legal employer that you have specified.

**Danish Tax Card Upload (PAY)**

This concurrent program depends on a PL/SQL executable, which would read the useful data from the flat file sent by the tax authorities, validate the data, and put the data into temporary interface tables used by the Data Pump process.

**Default Enrollment Process (Advanced Benefits)**

Run this process to enroll participants into the default benefit plan when participants have not made an election.

**Direct Deposit (Payroll) (Canada, Oracle HRMS Payroll Processing Management Guide, Mexico, Oracle HRMS Payroll Processing Management Guide)**

The Direct Deposit process produces files that you transfer to your financial institution for direct deposit payments.

**Direct Deposit (Singapore IBG Format) (Payroll) (Singapore)**

Creates a payment file and report, run after PrePayments is complete for the payroll.

**Direct Deposit Process (China - CCBS Format) (Payroll) (China)**

This report produces a deposit advice in the correct format. This process generates two outputs:

- A hard copy called "Bank Transfer Report". This output provides a list of employees who had been processed in the Direct Deposit Process.
- A magnetic file for submission to the bank

Once the advice is transferred to the bank, the bank deposits the payments directly into the worker's account.

**Direct Entry (Australian BECS Format) Process (Australia)**

Produces a payment file for all employees.

**Direct Entry (Reconciliation Report) (Australia)**

Produces a payment file for all employees. This file is the output version of the magtape sent to the government.

**Download HRMS Taskflows Process**

Run this process to export a task flow from your database to a flat file that you can then import to another database.

**Duty Station Conversion Process (Federal)**

Moves employees from an old to a new Location

**Electronic Lodgement of TFN Declaration report (.mf) (Australia)**

The Electronic Lodgement of TFN Declaration process allows you to produce a report for any new or changed TFN details for the employees in an organization. This file is the binary magtape file that is used for uploading to the government.

**Electronic Lodgement of TFN Declaration report (.out) (Australia)**

The Electronic Lodgement of TFN Declaration process allows you to produce a report for any new or changed TFN details for the employees in an organization. This file is the output version of the magtape file that is sent to the government.

**Electronic Tax File Process (Payroll) (South Africa)**

Produces tax files in ASCII format.

**Electronic UIF File Preprocess (South Africa)**

This preprocess archives UIF information for the Electronic UIF File.

### **Electronic UIF File Process (South Africa)**

The Electronic UIF File must be submitted on a monthly basis.

### **Employment Equity Interface**

The Employment Equity Reports provide qualitative and quantitative data on the representation of designated group members for review, publication, and dissemination to the public. These reports determine the degree of representation of persons in the four occupational groups in that workforce:

- Women
- Aboriginal peoples
- Persons with disabilities
- Visible minorities

Use the Employment Equity Interface request set to generate a set of tab-delimited text files of employee information. You can then import these files into the Employment Equity Computerized Reporting System to generate the Employment Equity Report.

### **Enable Multiple Security Groups Process**

Run this process when you first set up security groups enabled security.

### **End of Year Process (Payroll) (UK)**

Produces statutory End of Year return to the Inland Revenue for employees in your enterprise.

### **Enhanced RetroPay**

Use the Enhanced RetroPay process to distribute backdated amounts or corrections that you have identified from the Retro-Notifications report.

### **Export GL Company Cost Center Process**

The process is run for your current business group and writes information about GL company cost center combinations for companies that you have previously defined for your business group to a tab delimited file. It creates a record in the file for each unique company cost center combination that has been defined in GL.

### **Extract Change Event Log Purge**

Run this process on a periodic basis to purge unwanted data, by person or date, from the system extract change event logs.

### **Extract Definition Download to Data File**

Copies a system extract definition to a file for upload to another business group or Oracle HRMS database.

### **Extract Definition Upload to Data File**

Imports a copy of a system extract definition to a new business group or Oracle HRMS database.



**Extract Process (Advanced Benefits)**

Run the extract process to save the output of your system extract to the directory and file that you specified in your extract definition.

**Extract Results Data Purge**

On a periodic basis, run the purge process to free table space in the system extract results tables.

**Extracting Information to Appear on the Payslip (Payroll)**

Enables you to access the latest data relevant to the payslip, and copy it to archive tables.

**Federal Benefits - FEHB Conversion of Benefits (Federal)**

This process converts the existing element records for those employees participating in Federal Employee Health Benefits to the Benefits model.

**Federal Benefits - TSP Catchup Conversion of Benefits (Federal)**

This process converts the existing records for employees participating in TSP Catch-Up to the Benefits model.

**Federal Benefits - TSP Conversion of Benefits (Federal)**

This process migrates converts the existing records for employees participating in TSP to the Benefits model.

**Federal Year End Amendment Preprocess (Payroll) (Canada)**

The Federal Year End Amendment Preprocess archives all amended T4/T4A boxes as well as those that were correct on the original T4/T4A form. The Federal Year End Amendment Preprocess is submitted only if there are employees whose data has been corrected after the Federal Year End Preprocess was run and forms were issued for that reporting year.

**Finland Populate Countries (HR)**

This process matches the territory codes to the territory names and updates the FI\_REGIONAL\_MEMBERSHIP table.

**Finnish Payment Output File (Payroll)**

This process generates the payment file to be sent to the bank.

**Finnish Payroll Run**

This process makes the entry of the Run Type field mandatory and also ensures that the Run Type field displays all the run types.

**Finnish Postal Code Upload (HR)**

This process uploads the postal code and post office details to the postal code lookup.

**Finnish Tax Card Requisition (Payroll)**

This process retrieves the employee information from the local unit or from all the local units under the legal employer, depending on the parameter passed by the user.

**Finnish Tax Card Upload (Payroll)**

This process is based on a PL/SQL executable, which would read the useful data from the flat file sent by the tax authorities, validate the data, and put the data into temporary interface tables used by the Data Pump process.

**Forms Configurator - Download Template**

Run this process to download one or more people management templates to a data file.

**Forms Configurator - Upload Template**

Run this process to upload a template to enable you to use it with the People Management Configurator (Forms Configurator) tool.

**French PTO Accruals - Create Entitlements Process**

Enables you to create entitlements from accruals, so that holidays may be spent.

**French PTO Accruals - Obsolete Entitlements Process**

Enables you to obsolete unspent entitlement.

**Full Settlement Process (Payroll) (France)**

This produces a letter in duplicate stating that the employee agrees that their termination has been concluded correctly.

**Generate Employee Statements Process**

Use this process to generate Total Compensation Statements using a statement setup and period you defined.

**Generate Overtime Payment Mapping Process (Payroll) (France)**

Allows you to associate your overtime scheme with a payroll calendar.

**Generate Run Balances (Payroll)**

Run this process when you want to recalculate run level balance values that may have become invalid, such as through changes to historical data.

**Generate Secure User Process (SECGEN)**

Run this process when you create a new security profile that references a reporting user.

**Grant Permissions to Roles Process (ROLEGEN)**

Dynamically grants select permissions on Oracle HRMS tables and views to the HR\_REPORTING\_USER role.

**HR Applicant Assignment Cleanup Process**

The HR Applicant Assignment Cleanup Process corrects the existing applicant assignment records. This data cleanup process ensures reliable reporting and prevents potential future issues related to update of workers' and applicants' records.

See: *Guide to the HR Applicant Assignment Cleanup Process* (available on Oracle Metalink Note ID 295319.1)

**IE Cheque Writer (Payroll) (Ireland)**

This process is used to write sequences of cheques for your Irish payroll run.

**Initial Balance Structure Creation (France) Process (France)**

The Initial Balance Structure Creation (France) process automatically creates the entities necessary to perform balance initialization such as elements and links, input values and link input values, and initial balance feeds for payroll calculations.

**Initial Upload Balance Process**

The Initial Upload Balance process sets up the initial values for the legislative and user-defined balances for payroll calculations.

**IR56B Archive Process (Payroll) (Hong Kong)**

The IR56B Annual Employers Return Archive process stores employee and balance information, which is used in the IR56B Report and the Magnetic Tape process.

**IR56B Magnetic Tape Process (Payroll) (Hong Kong)**

The IR56B Magnetic Tape process produces the end of year magnetic tape from the Archived Information.

**IR8A File (Payroll) (Singapore)**

Creates a file that includes your employees' earnings for a specific tax year and legal entity. The process also creates a report for you to view the contributions that are included in the file.

**IR8S File (Payroll) (Singapore)**

Creates a file that includes your employees' and employers' earnings for a specific tax year and legal entity. The process also creates a report for you to view the contributions that are included in the file.

**IRAS Line Archive (Payroll) (Singapore)**

Archives the data that will later be used to create the year-end magnetic tapes.

**Maintain Designee Eligibility (Advanced Benefits)**

Run this process for those benefit plans that include an age factor in determining dependent eligibility.

**Maintain Participant Eligibility Process (Standard Benefits)**

Run this process if you license Standard Benefits and you want to determine benefits eligibility for a segment of your employee population. This process also de-enrolls currently enrolled participants who lose benefits eligibility and ends their associated benefits coverage and activity rate.

**Manual Credit Transfer Cheque Payments (Payroll) (South Africa)**

Updates system with cheque number of manually issued cheques.

**Manual Payments (Payroll) (South Africa)**

Updates system with manual payments made to employees.

**Manually Issued Tax Certificates (Payroll) (South Africa)**

Updates system with manually issued tax certificates numbers.

**Mark Paper W-2c and Exclude From Future Tapes (Payroll) (US)**

If you are filing more than 249 W-2Cs in a tax year, you are required to file from the 250th W-2C onward on magnetic media. Since you may have filed the first 249 W-2Cs on paper, Oracle provides the "Mark Paper W-2c and Exclude From Future Tapes" request set to denote that some W-2Cs have been filed on paper with the government while others will be picked up by the W-2C Magnetic Media process.

**Mark Payroll Run for Retry (Payroll)**

Use this process to mark a small payroll run for retry.

**NACHA Process (Payroll) (US)**

Produces files that you load on magnetic tape and despatch to banks for direct deposit payments.

**P11D Benefits and Expenses Report (HR, Payroll) (UK)**

Takes a P11D archive request ID and prints a selection of Class 1A benefits and expenses.

**P11D Gaps and Overlaps Report (HR, Payroll) (UK)**

Identifies a taxable benefit that is spread over multiple periods with a gap between each period, and also identifies taxable benefits of the same type that overlap each other within the same period.

**P11D Magtape (HR, Payroll) (UK)**

Generates a magnetic tape containing details of Class 1A NICs for reporting to the Inland Revenue.

**Partial Period Accrual Calculation Process (Core Payroll, and enabled localizations)**

Run this process to calculate accruals when the end of your accounting period occurs part way through a payroll period.

**Participation Batch Process: Grade Step**

Run this process to determine eligibility and electable choices for employees whom you want to progress using Grade/Step Progression.

**Participation Batch Process: Life Event (Advanced Benefits)**

Run this process to determine eligibility and electable choices for benefits participants based on a life event you select.

**Participation Batch Process: Scheduled (Advanced Benefits)**

Run this process to determine eligibility and electable choices for benefits participants based on a scheduled enrollment event.

**Participation Batch Process: Selection (Advanced Benefits)**

Run this process to determine eligibility for benefits participants. This process does not create electable choices.

**Participation Process: Compensation Workbench**

Run this process for Compensation Workbench prior to the availability of a plan for budget and worksheet entry.

**Pay Advice (Mexico) (Payroll) (Mexico)**

The Pay Advice (Mexico) process produces a pay receipt form for submission to all employees. This slip reports all earnings an employee has incurred across the pay period.

**Pay Advice Generation - Self Service (South Africa)**

Archives balances and elements you define and other pay advice related information.

**PayPath Process (Payroll) (Ireland)**

Generates a magnetic tape file to send to the bank to make payments to employees.

**Payroll Archive (Payroll) (US)**

The Payroll Archive preserves payroll run information, so you can use it for accurate payroll reporting or third-party tax filing. This is a mandatory part of payroll processing if you are using the Online Payslip functionality included with Oracle Self-Service HRMS or if you will be using the FLS tax filing interface.

**Payroll Archiver (Payroll) (Mexico)**

The Payroll Archiver preserves payroll run information, so you can use it for accurate payroll reporting or third-party tax filing. This is a mandatory part of payroll processing if you are using the Online Payslip functionality included with Oracle Self-Service HRMS. This process logs:

- PrePayment process
- Reversals
- Balance adjustments

You must run the Payroll Archiver after you have run Payroll and Pre-Payments but before running the Cheque Writer process.

**Payroll Process Workflow (Payroll) (Canada, *Oracle HRMS Payroll Processing Management Guide*, US, *Oracle HRMS Payroll Processing Management Guide*)**

Oracle Payroll includes a process workflow that enables you to complete all the individual payroll processing steps by submitting a single request.

**Payroll Run (Payroll) (France)**

The Payroll Run is the regular method to process employee pay.

**Payslip Generation - Self Service (UK)**

Generate payslips for employees to view online through Oracle Self-Service.

**Payslip Generator - Statement of Earnings (Payroll) (France)**

This process generates pay advice data for all employees for a specified payroll and period.

**Pension Extracts**

These processes enable you to extract employee pension plan-related data for transfer to third-party providers.

**Pension Extracts (Electronic Notification) (Netherlands)**

This process extracts the pensions and social insurance data you require for the monthly notification report to ABP and UWV USZO.

**Periodic Tax Filing Interface (Payroll) (US)**

The Periodic Tax Filing Interface creates a flat file (.mf) containing the archived data from the Payroll Archive in a format that can be directly submitted to Federal Liaison Services, Inc. (FLS) for tax filing and reporting.

**Populate FEHB Program and Plan Design (Federal)**

This process populates the Federal Employee Health Benefits program and plan designs for use in professional user interface forms and self-service benefits.

**Populate TSP Catchup Program and Plan Design (Federal)**

This process populates the Thrift Savings Plan Catch Up program and plan designs for use in professional user interface forms and self-service benefits.

**Populate TSP Program and Plan Design (Federal)**

This process populates the US Federal Thrift Savings Plan programs and plan designs for use in professional user interface forms and self-service benefits.

**PrePayments (French) Process (Payroll) (France)**

Use this process to distribute employee pay over more than one payment method using either a percentage or monetary split. This process runs prepayments for one calendar month only.

**PrePayments Process (Payroll)**

Use this process to distribute employee pay over more than one payment method using either a percentage or monetary split.

**Previous Services Validation (HR) (France)**

Use this process to validate the employee's (titulaire) services for a period in which the employee has worked in some other public sector type organization as non-titulaires.

**Printing the Payslip**

Enables you to access the archived payslip information, and create a formatted file ready for printing and distributing to your employees.

**Process Automatic WGI (Federal)**

Schedule the Within Grade Increases (WGI) process to set the frequency with which the system processes automatic WGIs.

**Process Forfeitures (US)**

Calculates--by participant--the total unspent contributions for a spending account benefits plan.

**Process Future Dated RPAs (Federal)**

Establishes the frequency for processing future Request for Personnel actions.

**Process Mass Realignment (Federal)**

Runs the final Mass Realignment action and updates the results to the HR database.

**Process Mass Salary (Federal)**

Runs the final Mass Salary action (Mass Standard Pay Adjustment, Mass Percent Pay Adjustment, Mass Locality Adjustment) and updates the results to the HR database.

**Process Mass Transfer In (Federal)**

Runs the final Mass Transfer In and updates the results to the HR database.

**Process Mass Transfer Out (Federal)**

Runs the final Mass Transfer Out action and updates the results to the HR database.

**Profit Sharing Process (Payroll) (Mexico)**

This process performs the calculations to determine each employee's profit sharing income and stores the results in a batch file. Once you transfer the batch file, the earnings are included in a standard payroll run.

**Provincial Year End Amendment Preprocess (Payroll) (Canada)**

The Provincial Year End Amendment Preprocess archives all amended RI-1/RI-2 boxes as well as those that were correct on the original RL-1/RL-2 slips. The Provincial Year End Amendment Preprocess is submitted only if there are employees whose data has been corrected after the Provincial Year End Preprocess was run and slips were issued for that reporting year.

**Prud'hommale (Workers Election) Declaration Process (HR) (France)**

Creates a statutory declaration which enables your employees to take part in the Industrial Tribunal elections.

**Purge Backed-Out or Voided Life Events**

Removes person data associated with backed-out or voided life events for Advanced Benefits and Compensation Workbench.

**Purge Employee Statements Process**

Use this process to purge Total Compensation Statements for the statement and period you select, if statements for the statement setup and period you select already exist.

### **Purge Plan Design Copy Process**

This process purges unwanted data associated with copying a plan design for Benefits, Compensation Workbench, Individual Compensation Distributions, or Absence plans.

### **Recalculate Participant Values (Standard Benefits) (US)**

Updates activity rates for currently enrolled benefits participants based on plan design changes.

As a prerequisite, you should run the Maintain Participant Eligibility process to update eligibility records and derived factors.

### **Record of Employment (Payroll) (Canada)**

Archives the Record of Employment information for a single employee.

### **Record of Employment by Assignment Set (Payroll) (Canada)**

Archives the Record of Employment information for all employees in an assignment set.

### **Register Extra Information Types (EITs)**

Enables you to register the new Extra Information Types (EITs) that you create using the Descriptive Flexfield window.

**Note:** This process cannot be used to register organizational EITs.

### **Relieve Commitments**

Run the Relieve Commitments request set to calculate budget commitments and post the results to Oracle General Ledger. The request set combines the Calculate Commitments process and the Commitment GL Posting process.

### **Remove Title from Person's Full Name**

Run the Remove Title from Person's Full Name concurrent process to remove title from existing records without updating them.

### **Reopen Welcome Page Process**

Use this process to reset the welcome page. If you configured your setup to enable employees to hide the welcome page, then this process clears employee' selections to hide the welcome page.

### **RetroPay**

Enables you to make back pay adjustments.

### **RetroPay (Enhanced) (RetroPay)**

Use the Enhanced RetroPay process to distribute backdated amounts or corrections that you have identified from the Retro-Notifications report.

### **RetroPay by Element (RetroPay)**

Use the RetroPay by Element process to distribute backdated amounts or corrections that you have identified from the Retro-Notifications report.



**Retry Payroll Process**

Retry a payroll process.

**Retry US Payroll Process (Payroll) (US)**

Retry a US payroll process

**ROE - Magnetic Media (Payroll) (Canada)**

Generates the Record of Employment magnetic media output necessary for submission to the HRSD Laser Print software.

**Rollback**

Use this process to rollback a non-Payroll run or magnetic media report.

**Rollback Magnetic Report**

Use this process to rollback a magnetic media report.

**Rollback Run (Payroll)**

Use this process to rollback a Payroll run.

**Rollback US Payroll Process (Payroll) (US)**

Run the Rollback US Payroll Process if you have already run a magnetic tape report and must make changes to the data that was processed.

**Running the P45 EDI Process (UK)**

Enables you to notify the Inland Revenue about employees who leave your employment.

**Running the P45 Process (UK)**

Enables you to print and archive, or just archive specified P45's.

**Running the P45(3) EDI Process (UK)**

Enables you to notify the Inland Revenue about a new starters information, or someone receiving a pension.

**Running the P46 EDI Process (UK)**

Enables you to provide information on new employees who cannot produce, or have never had a P45.

**Running the P6 and P9 Upload Process (UK)**

Run the process to upload the details about changes to an employee's tax code, or coding changes from the Inland Revenue.

**Running the Works Number Update (UK)**

Run to provide information on updated and new employee works numbers.

**Saudi Payroll Archiver Process (Payroll) (Saudi Arabia)**

Use this process to archive the payroll details for each payroll period for future reference. This supports production of Online Payslip and Payroll Register reports.

**Saudi Payroll Upgrade Process (Payroll) (Saudi Arabia)**

Use this process to migrate data from existing payroll runs and generate group reports for employees.

**Security List Maintenance Process (PERSLM)**

This process is usually run every night to maintain the lists of organizations, positions, payrolls, employees, and applicants that security profile holders can access.

**Seed French Data Process (France)**

This process creates and populates user defined tables using predefined lookup types and rows.

**Single Person Participation Process**

If you need to run the participation process for employees not previously selected for processing, new or terminated employees, or employees who had a status of life event started, or for managers who are now eligible for awards, then run the participation process for an individual even after you run the Participation Process: Compensation Workbench for a plan. The Single Person Participation process determines a person's eligibility for the plan and rates, and places the person according to the hierarchy.

**Social Security Affiliation Data Archive Process (HR) (Mexico)**

Mandatory statutory Social Security process that compiles a list of all employee status changes for a GRE during a reporting period.

**Social Security Archiver (HR) (Mexico)**

The Social Security Archiver compiles all the employment status changes that have occurred since the last time you ran it.

**Start of Year Process (Payroll) (UK)**

Usually performed at the start of the tax year to update tax information for each employee.

**Synchronize GL Company Cost Centers with Existing Organizations**

This process links existing and newly created company cost center organizations to GL account combinations, where a link does not already exist.

**Synchronize GL Company Cost Centers with HR Request Set**

This request set runs the following two processes:

- Create and Maintain Company Cost Center Organizations, page B-90
- Synchronize GL Company Cost Centers with Existing Organizations, page B-102

### **Synchronize Positions Process**

This process updates the non-datetracked Positions table (PER\_ALL\_POSITIONS) with changes made to the datetracked table (HR\_ALL\_POSITIONS\_F). When you run the process, any datetracked changes with an effective date on or before today are applied to the non-datetracked table.

### **Synchronize Salary Rates Process (France)**

This process synchronizes the existing salary rates in the corps set up when you update the indemnity rates defined for your global pay scale. This match ensures that you use current compensation values in your pay scales.

### **Tax Batch Update Process (Germany)**

The Tax Batch Update Process enables you to update the tax records for employees who have not submitted their tax cards for the current tax year. You can either run the process in report-only mode, which identifies the employees whose records would be subject to change, or in update mode to make the changes to the records.

### **Tax Credit Upload (Payroll) (Ireland)**

The Tax Credit Upload process enables you to upload the tax credits of an employee from the data file provided by the Revenue. It also specifies standard rate cut-off amounts for each employee. The tax credit upload process validates the records provided by the Revenue and then uploads them into the PAY\_IE\_PAYE\_DETAILS\_F table.

### **Tax Year End Data Validation and Preprocess (Payroll) (South Africa)**

Preparation for issue of tax certificates.

### **Tax Year Start Process (Payroll) (South Africa)**

Updates employee tax information at the start of each tax year.

### **Tax Year Start Rollback (Payroll) (South Africa)**

Rolls back the actions performed in the Tax Year Start Process.

### **Termination Category Setup Process (Payroll) (South Africa)**

Part of setup required for storing Employment Equity and UIF information.

### **Transfer Student Earnings to Financial Aid System Process (Payroll) (US)**

Transfers student earnings data from Oracle Payroll to the Oracle Student System (OSS) Financial Aid module.

### **Transfer Student Work Study Awards to BEE Process (Payroll) (US)**

Creates or updates earnings element entries for student employees in HRMS using student work authorization information from the OSS Financial Aid module.

### **Transfer to GL Process**

Transfers the results of the costing process to the Accounting flexfield of Oracle General Ledger.

**Upgrade from ADE to Web ADI**

Run this process to convert styles used by Application Data Exchange (ADE) to integrators in Web Applications Desktop Integrator (Web ADI).

**Upload GL Company Cost Center Information Request Set**

Run the Upload GL Company Cost Center Information request set to upload the amended version of the exported file created using the Export GL Company Cost Centers process.

**Upload HRMS Taskflows Process**

Run this process to import a task flow to your database from a flat file exported from another database.

**Upload Social Insurance Providers Process (Germany)**

The Upload Social Insurance Providers Process enables you to upload a delivered list of social insurance providers to your German HR system.

**Upload Tax Offices Process (Germany)**

The Upload Tax Offices Process enables you to upload a delivered list of tax offices to your German HR system.

**Upload Taxable Benefits (HR , Payroll) (UK)**

The Taxable Benefits process enables you to upload a flat file of P11D elements to your P11D data repository.

**Vehicle Mileage Calculation Information (Payroll) (UK)**

Enters or deletes default mileage elements and rates tables for categories of vehicles in your business group.

**Void Check/Cheque Payments (Payroll)**

Uploads details of canceled check/cheque payments.

**Void Cheque Payments (South Africa) (Payroll) (South Africa)**

Uploads details of canceled cheque payments.

**Void Credit Transfer Cheque Payments (Payroll) (South Africa)**

Voids aggregated cheque payments made to banks.

**Void Payments Process (Payroll) (UK, US)**

Allows you to void cheques that have been printed but need to be cancelled.

**W-2C Pre-Process (Payroll) (US)**

The W-2c Pre Process takes a snapshot of year end employee information after year end processing is complete, so you can include any changes on the Form W-2c.

### **Wage and Tax Statement Form (Form W-2) (Payroll) (US)**

The Wage and Tax Statement (Form W-2) is used by employers to report taxable and non-taxable income information of individual employees to the IRS and State governments.

### **Year Begin Process (Payroll) (US)**

Oracle Payroll provides the "Year Begin Process" for you to clear the previous year's legislative customizations and prepare for the next year. Run this process after you run the last payroll of the year and before you run the first payroll of the next year.

### **Year End Archiver (Payroll) (Mexico)**

The Year End Archiver is the Oracle Payroll utility that archives employee and employer data for a specific year and legal employer. Once archived, this data is available for end of year reporting.

You would run the Year End Archiver:

- Whenever you terminate an employee. You must archive the employee information before you can generate the Format 37. Use an assignment set that contains at least one of the employee's assignments.
- Before performing year end reporting. Run the Year End Archiver for all employees within each legal employer in the business group.

### **Year End Pre-Process Re-Archive (Payroll) (US)**

Run the Year End Pre-Process Re-Archive to include Employer data on the Federal or state magnetic W-2 that was missing or NULL.

### **Year End Preprocess (Payroll) (Canada)**

The Federal and Provincial Year End Preprocess archives employee and employer data for a specific year by GRE or PRE. Once archived, this data is available for end of year reporting. The data from the Year End Preprocess is archived in the system, so you can regenerate year end reports as required. The Year End Preprocess must be run for the entire business unit before year end reporting can be done.

### **Year End Preprocess (Payroll) (US)**

The Year End Preprocess is the Oracle Payroll utility that archives employee and employer data for a specific year and GRE. Once archived, this data is available for end of year reporting. The system archives the data from the Year End Preprocess so you can regenerate year end reports as required.



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# 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.

## **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-25

## **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.

## **Active Employee**

DBI for HRMS counts an employee, page Glossary-13 as active if they have a current period of service, page Glossary-10 at the effective date, page Glossary-12

If an employee is suspended, DBI for HRMS still counts them as active.

DBI for HRMS also uses the term Incumbent to refer to an active employee.

**Active Contingent Worker**

DBI for HRMS counts a contingent worker, page Glossary-9 as active if they have a current period of placement , page Glossary-10 at the effective date, page Glossary-12.

If a contingent worker is suspended, DBI for HRMS still counts them as active. DBI for HRMS also uses the term Incumbent to refer to an active contingent worker.

**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.

**Agency**

An external organization that assists an enterprise in their recruitment process. Agencies act on behalf of the candidates to help them search and apply for jobs. They provide candidates to the fill up job openings in an enterprise or sometimes handle the complete placement process for a vacancy.

**Agency Candidate**

An agency candidate is a person whose profile is created in iRecruitment by a recruiting agency. This profile includes personal and professional information.

**Agency User**

An external person who belongs to a recruiting agency and accesses iRecruitment to conduct recruiting activities such as creating candidates and applying on behalf of the candidates.

**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.

**Align**

To define a relationship between objectives. Workers can align their own objectives with objectives that other workers have shared with them. Aligned objectives are also known as *supporting objectives*.



**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**

An applicant is a person who submits an application for employment to an organization.

**Applicability**

In HRMS budgeting, a term describing whether a budget reallocation rule pertains to donors or receivers.

**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-4.

**Appraisee**

The person who is the subject of an appraisal.

**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-9

**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-26

**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-24

**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.

**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-12

**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-27, *Field*, page Glossary-14

**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 business group represents a country in which your enterprise operates. It enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

**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.

**Business Rule**

See Configurable Business Rules, page Glossary-8

**Cafeteria Benefits Plan**

See: *Flexible Benefits Program*, page Glossary-14

**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-28

**Cascade**

A process managers at each level in a hierarchy use to allocate their own objectives to workers who report directly to them. This technique enables the allocation of enterprise objectives in some form to all workers.

**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.

**Chief HR Officer**

In DBI for HRMS the Chief HR Officer is the chief executive of the enterprise who can view the HR data at an enterprise-level.

**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-12

**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.

**Competency**

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competency*, page Glossary-33

**Competency Assessment Template**

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-21

**Competency Evaluation**

A method used to measure an employees ability to do a defined job.

**Competency Profile**

Where you record applicant and employee accomplishments, for example, proficiency in a competency.

**Competency Requirements**

Competencies required by an organization, job or position.

See also: *Competency*, page Glossary-8, *Core Competencies*, page Glossary-9

**Competency Type**

A group of related competencies.

**Configurable Business Rule**

In HRMS position control and budgeting, predefined routines (also called process rules) that run when you apply an online transaction, and validate proposed changes to positions, budgets, or assignments. You set their default status level (typically Warning) to Warning, Ignore, or Error.

**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: *Competency*, page Glossary-8

**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.

**Current Period of Service**

An employee's period of service is current if their most recent hire date is on or before the effective date, and either the employee does not have a termination date for their latest employment, or their termination date is later than the effective date.

The table below provides an example using an effective date of 12 October 2004:

Effective Date	Hire Date	Termination Date	Current Period of Service?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

**Note:** In Oracle HRMS an employee cannot transfer from one business group to another. To move from one business group to another, the business group they are leaving must terminate the employee, and the business group they are joining must re-hire the employee. Therefore the definition of period of service, above, does not take account of any service prior to the most recent business group transfer.

**Current Period of Placement**

A contingent worker's period of placement, page Glossary-23 is current if their most recent placement start date is on or before the effective date, and either the contingent worker does not have a placement end date for their latest placement or their placement end date is later than the effective date.

Effective Date	Place Date	End Placement Date	Current Period of Placement?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

**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-11, *Effective Date*, page Glossary-12

**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-12

**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.

**Department**

In DBI for HRMS, the term Department has the same meaning as Organization.

**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-34

**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-17

**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-14

**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-11

**EIT**

See: *Extra Information Type*, page Glossary-14

**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-27, *Nonrecurring Elements*, page Glossary-20

**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-31

**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.

Employees have a system person type of Employee and one or more assignments with an assignment type of Employee.

**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.

**End Placement Date**

DBI for HRMS uses this term to specifically refer to the contingent worker's most recent placement end date prior to the effective date.

**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-11

**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-27

**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-27, *Field*, page Glossary-14

**Format Mask**

A definition of a person-name format. The format mask comprises standard name components, such as title, first name, and last name, in an order appropriate to its purpose and legislation.

**Format Type**

A format-mask classification that identifies the mask's purpose. Oracle HRMS defines the Full Name, Display Name, List Name, and Order Name format types. You can also define your own format types for use in custom code.

**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-22

**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-15

**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.

**HR Staff**

In DBI for HRMS the HR Staff are people who work in the Human Resources role. Chief HR Officers can track the ratio of HR professionals to the number of workers in their enterprise.

DBI for HRMS uses the HRI\_MAP\_JOB\_JOB\_ROLE formula to categorize workers into HR staff and non-HR staff.

**Headcount Activity**

DBI for HRMS uses this term to mean all the gains and losses occurring in a manager's hierarchy during a reporting period.

**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.

**High Availability**

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

**Hire Date**

In DBI for HRMS Hire Date is the employee's most recent hire date.

**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.

**Incumbent**

See also: *Active Employee*, page Glossary-1

**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-11

**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.

**Legal Entity**

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate 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.

DBI for HRMS counts a person as a manager if they supervise assignments (directly or through subordinates) for which the total headcount value is greater than zero at the effective date.

### **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-27

**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.

**Objective Assessment Template**

The entity that configures the Objectives section of the appraisal.

See also: **Competency Assessment Template**, page Glossary-8

**Objectives Library**

A collection of reusable objectives. HR Professionals can either create individual objectives in the Objectives Library or import them from an external source.

**Off-Boarding**

Descriptive term covering all HR processes and procedures involved in removing a worker from your organization, including termination, relocation, and long-term sickness.

**OLM**

Oracle Learning Management.

**On-Boarding**

Descriptive term covering all HR processes and procedures involved in hiring and integrating a worker in your organization, including recruitment, hiring, and orientation.

**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.

**Organization Manager Hierarchy**

An HRMS structure that contains supervisors and subordinates on a reporting chain who also own organizations. HRMS uses this hierarchy to filter the information you display in report modules, such as the Daily Business Intelligence Workforce Budget Management dashboard, to include only managers who own organizations.

**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-15

**Pay Value**

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-17

**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 Plan**

The entity that defines the performance-management process for a specified period. A component of the Workforce Performance Management function.

**Performance Management Viewer (PMV)**

A reporting tool that displays the report that corresponds to one or more PMF targets.

**Period of Incapacity for Work (PIW)**

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less than the linking interval, a linked PIW is formed and the two PIWs are treated as one.

**Period of Placement**

The period of time a contingent worker spends working for an enterprise. A contingent worker can have only one period of placement at a time; however, a contingent worker can have multiple assignments during a single period of placement.

**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.

**Personal Scorecard**

A collection of objectives for a single worker arising from a single Performance Management Plan.

**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.

**Placement Start Date**

In DBI for HRMS Placement Date is the contingent worker's most recent start date prior to the effective date.

**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.

**Process Rule**

See Configurable Business Rules, page Glossary-8

**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**

A worker's perceived level of expertise in a competency, in the opinion of an assessor, over a given period. For example, a worker may demonstrate the communication competency at Novice or Expert level.

**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-22

**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-8

**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-30

**Qualifying Week**

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

**Quebec Business Number**

In Canada, this is the employer's account number with the Ministère du Revenu du Québec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

**Questionnaire**

An SSHR function which records the results of an appraisal.

**QuickPaint Report**

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-4

**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.



**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-20, *Standard Link*, page Glossary-31

**Referenced Rule**

In HRMS budgeting, any predefined configurable business rule in the Assignment Modification, Position Modification, or Budget Preparation Categories you use as the basis for defining a new rule.

See Configurable Business Rules, page Glossary-8

**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-14

**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-28

**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-29, *User Profile Options*, page Glossary-33, *Request Groups*, page Glossary-28, *Security Groups*, page Glossary-28

**Resume**

A document that describes the experience and qualifications of a candidate.

**RetroPay**

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

**Retry**

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

**Revenue Canada**

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministère du Revenu du Québec.

**Reversal**

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

**Reviewer (SSHR)**

A person invited by an appraising manager to add review comments to an appraisal.

**RIA**

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

**Rollback**

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

**Rollup**

An aggregate of data that includes subsidiary totals.

**Run Item**

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

**Salary Basis**

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

**Salary Rate**

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

**Scheduled Enrollment**

A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

**Search by Date**

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

**Security Group**

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-28, *Security Profile*, page Glossary-29, *User Profile Options*, page Glossary-33

**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-28

**Self Appraisal**

Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

**Separation Category**

See also: *termination category*, page Glossary-32

**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-31

**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-31

**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-12, *Recurring Elements*, page Glossary-27

**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).

**Student Employee**

A student who is following a work-study program. Student employees have HRMS person records (of system type Employee) so that you can include them in your payroll.

**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.

**Supporting Objective**

An objective aligned with another objective. Supporting objectives contribute to the achievement of the objectives they support.

**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 Category**

When employees leave an enterprise, the decision is either made by the employee or by the enterprise. When the decision is made by the employee the termination is Voluntary. When the decision is made by the enterprise, the termination is Involuntary.

DBI for HRMS uses a formula to determine which category each termination belongs to, based on the associated leaving reason.

HRMSi elsewhere refers to Termination Category as Separation Category.

**Termination Date**

DBI for HRMS uses this term to specifically refer to the employee's most recent termination date prior to the effective date.

**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.

**Transcensive**

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 Competency**

A competency 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-5

**User Profile Options**

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-28, *Security Profile*, page Glossary-29

**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, page Glossary-13 or a contingent worker, page Glossary-9

In DBI for HRMS workers are employees and contingent workers who report to the selected manager.

**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.



**Workforce Performance Management**

The Oracle HRMS functions that support enterprise-directed objective setting, management, and assessment.

**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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# Index

## A

---

- Address
  - adding a city, 2-73
- Addresses
  - entering, with Oracle Payroll, 2-75
  - floor or office numbers, 2-60
  - generic, for people, 2-74
- Applicant
  - entering information, 2-17
- Applicant assignment statuses
  - mass update of, 1-14
  - terminating applicant assignments, 1-15
  - updating, 1-13
- Applicant information, 2-22
- Applicant interviews, 1-10
- Applicant number, 2-19
- Applicant status
  - changing to accepted, 1-24
- Applicant termination
  - employee termination, 2-68
- Applicants, 1-11
  - Applicant Details Report, 2-97
  - assignment status, 1-9
  - cancelling a termination, 1-15
  - cancelling records, 1-14
  - creating applicant numbers, 2-18
  - entering, 1-7
  - entering new, 1-21
  - hiring, 1-24
  - interviewing, 1-10
  - making an offer, 1-23
  - mass update of status, 1-14
  - matching skills, 1-8
  - referring to another recruiter, 1-14
  - rejecting assignments, 1-15
  - Requisition Summary Report, 1-16
  - scheduling interviews, 1-13
  - selection processing, 1-7
  - terminating, 1-15, 1-26
  - termination, 1-11
  - tracking progress, 1-9
  - using folders for customized queries, 2-102
  - viewing current list, 2-104
- Application
  - reactivating an, 1-25
  - recording an, 1-22

- Application window, 1-12
- Applications
  - ending, 1-25
  - entering information, 1-12, 1-23
  - recording, 1-11
- Appraisal templates, 5-87
- Appraisals, 5-105
  - approval of, 5-76
  - example process, 5-77
  - overview, 5-2, 5-71
  - process, 5-74
  - setting up, 5-84
  - updating competency profiles after, 5-73
  - workflow notifications, 5-80
- Approving
  - Request for Personnel Action, 3-25, 3-26
- Assessments, competency-based, 5-6
- Assignment reporting
  - Assignments Folder, 2-103
- Assignment statuses
  - accepted, 1-9, 2-54
  - active, 1-9, 2-54
  - defining primary statuses, 2-57
  - defining user statuses, 2-57
  - offer, 1-9, 2-54
  - primary, 1-10
  - reporting on, 2-98
  - secondary, 1-10
  - terminate application, 1-10
- Assignments
  - activating, 2-88
  - entering details, 2-58
  - Extra Information, 2-56
  - for employees, 2-36
  - numbering, 2-10
  - status types, 2-55
  - suspending, 2-88

## B

---

- Back-to-back applications, 1-8
- Back-to-back hiring, 1-17
- Bank information
  - for magnetic transfer payment methods, 2-39
- Bargaining unit
  - entering on assignment, 2-61

- Birth details, 2-19
- Blood type
  - entering employee details, 2-23
- business requirements, 2-2

## C

---

- Canceling
  - Request for Personnel Action, 3-34
- Cancellation Action, 3-34
- Career paths, 5-98
  - defining, 5-100
  - naming, 5-100, 5-100, 5-101
- Career plans
  - modeling, 5-96
  - modeling based on jobs, 5-99
  - modeling based on positions, 5-99, 5-100, 5-101
  - modeling with LMDA, 5-99, 5-99
  - ways of holding information, 5-99, 5-99
  - web appraisals, 5-99
  - web-based access, 5-99
- Communication delivery methods
  - entering, 2-77
- Competencies
  - assessing during an appraisal, 5-91
  - automatic notification of renewal, 5-9
  - copying core competencies, 5-26
  - core, 5-21
  - creating, 5-16
  - delivering through schools and colleges, 5-66
  - delivery through OLM, 5-9
  - describing, 5-9
  - essential, 5-22
  - evaluating applicants and employees against vacancies, 5-26
  - grouping, 5-14, 5-20
  - job, 5-21
  - leadership, 5-21
  - making changes to profiles, 5-26
  - management, 5-21
  - measuring, 5-8
  - methods of measurement, 5-11
  - overview, 5-8
  - position, 5-21
  - proficiency levels, 5-12
  - proficiency rating scales, 5-12
  - qualifications, 5-66
  - Qualifications Framework details, 5-17
  - querying, 5-19
  - rating, 5-10
  - recording for employee development, 5-26
  - recording school and college attendance, 5-26
  - recording work preferences, 5-26
  - recruitment, 1-8
  - reporting, 5-108
  - required certification, 5-18
  - requirements, 5-25
  - retrieving, 5-21

- types, 5-14
- unit standard, 5-8
- upload third-party, 5-19
- using proficiency levels with, 5-9
- viewing, 5-25
- Competency approach, 5-5
- Competency Assessment Templates, 5-89
- Competency measurement
  - general method (rating scales), 5-11
  - individual method (proficiency levels), 5-11
  - unit standard competencies, 5-13
- Competency profiles, 5-9
  - updating automatically, 5-73
- Competency requirements
  - creating, 5-21
  - organization, job, or position level, 5-25
  - overview, 5-21
- Competency types, 5-14
  - adding competencies to, 5-14
  - advantages of, 5-14
  - assessments, 5-14
  - creating, 5-20
  - deleting, 5-14
- Contacts, 2-77
  - entering information, 2-73
- Contingent worker suppliers, 2-47
- Contingent workers, 2-42
  - assignment, 2-45
  - assignment rate types, 2-43
  - canceling a termination, 2-71
  - defining a combination of assignment rate type and basis for, 2-50
  - ending a placement, 2-44, 2-70
  - ending assignments, 2-47
  - entering assignment rates for, 2-51
  - entering information, 2-87
  - ex-contingent worker placement, 2-51
  - ex-employee placement, 2-51
  - in SSHR, 2-42
  - maintaining, 2-87
  - managing assignment changes, 2-46
  - managing multiple assignments, 2-46
  - person types, 2-44
  - processing for US federal workers, 2-48
  - security, 2-44
  - separating from employees, 2-44
  - terminating, 2-47
  - updating, 2-87
  - US federal processes, 2-48
  - using numbers to identify, 2-9
- contingent workers
  - federal, 2-48
- Contract letter types
  - defining, 2-31
- Contract statuses
  - creating, 2-30
- Contracts, 2-30
  - deleting, 2-32

- entering, 2-31, 2-31
- generating and printing, 2-34
- maintaining, 2-32
- managing, 2-33
- referring an assignment to, 2-61
- Conversion to Appointment
  - processing action, 3-42
- Correcting
  - Request for Personnel Action, 3-36
- Correction Actions, 3-31
- Correspondence languages, 2-22
- CPDF
  - updating personnel records, 3-23
- Create Federal Special Info Types
  - report, 2-28
- Customizing
  - People Folder window, 2-103
  - People window, 2-8

---

## D

- Date of death
  - entering, 2-22
- Dependents, 2-77
- Dual actions
  - processing on a Request for Personnel Action, 3-19
- Duplicate people
  - checking for, 2-89
- Duplicate person report
  - running the, 2-101

---

## E

- Effective dates
  - Not to Exceed actions, 3-41
  - Request for Personnel Action, 3-17
- Electronic authentication
  - Request for Personnel Action, 3-24, 3-26
- Employee assignment statuses, 2-53
  - and payroll processing, 2-54
  - element entries valid for, 2-54
  - secondary statuses, 2-54
- Employee assignments
  - and work structures, 2-36
  - changes to, and DateTrack, 2-63
  - components of, 2-36
  - contract, 2-61
  - creating employee numbers, 2-9
  - defining as primary, 2-60
  - definition, 2-36
  - ending all, 2-69
  - entering, 2-62
  - manager-level, 2-60
  - numbers for, 2-9
  - payment methods for, 2-39
  - placing in GREs, 2-58
  - rehiring, 1-19

- viewing current list, 2-104
- Employee lists
  - by assignment statuses, 2-98
  - by organization, 2-106
  - by personal information, 2-102
  - by position, 2-104
  - by position hierarchy, 2-105
  - by special information type, 2-106
- Employee numbers, 2-19
- Employees
  - background checks on, 2-23
  - conversion of ex-employee, 1-20
  - creating employee numbers, 2-18
  - entering medical details of, 2-23
  - managing, 2-2
  - summarizing personnel data, 2-26
  - tracking competencies and work preferences, 5-26
- Employment
  - hiring, 1-19
- Employment history, 2-38, 2-40
- Employment information
  - entering additional, 2-61
  - entering previous, 2-40
  - making changes to, 2-37
  - table of, 2-37
- enterprise
  - select reporting area, 2-110
  - select reporting area example, 2-111
- Event codes
  - productivity data, 3-14
- Event management, 1-10, 5-105
  - customizing Event Bookings window, 5-105
- Ex-contingent worker
  - contingent worker placement, 2-51
- Ex-employee worker
  - contingent worker placement, 2-51
- Extra Information
  - Assignment, 2-56
  - People, 2-11
  - Request for Personnel Action, 3-8

---

## F

- Federal Maintenance Forms
  - Restricted Forms, 3-21
- FEGLI
  - verifying and changing, 3-43
- Find Person window
  - using, 2-16
- Find window
  - finding a person or group of people, 2-85
- Folders
  - deleting, 2-92
- Folders for saved search criteria, 2-81
- Free text information, 5-104
- Full person details report
  - running the, 2-101

Further name information, 2-22  
Future actions  
    Cancellation RPA, 3-35  
    Correction RPA, 3-35  
    processing, 3-31  
    processing a Request for Personnel Action, 3-30

---

## G

Gender information  
    entry of, 2-18  
Global person numbering, 2-10  
Government Reporting Entity  
    *See* GRE  
Graphics, 2-24  
GRE  
    New Hire Reporting, 2-108  
    placing employee assignments in, 2-58  
    setting up New Hire Reporting, 2-107  
Group folders  
    creating new, 2-92  
    managing your, 2-86

---

## H

Headcount, 1-4  
Hiring  
    applicant, 1-19  
    ex-employee, 1-19  
    rehiring, 1-19  
Hiring people  
    New Hire reports, 2-95  
Hiring process, 1-17  
    back-to-back employment, 1-17  
    back-to-back placements, 1-17  
    hire date rules, 1-18  
    hiring applicants, 1-18  
    hiring ex-contingent workers, 1-18  
    rehiring ex-employees, 1-18  
History  
    Request for Personnel Action, 3-13  
Honors  
    entry of, 2-22  
Hours of work, 2-60  
Human resource management  
    career planning, 5-96  
    employee reviews, 5-105

---

## I

I-9 information, 2-21  
    entry of, 2-21  
Intervening actions  
    Request for Personnel Action, 3-30  
Interviews  
    with applicants, 1-10  
    with employees, 5-105

---

## J

job categories, 2-112  
Jobs  
    career paths, 5-100

---

## K

key concepts  
    competencies, qualifications, and development  
    intelligence, 5-108  
    people management intelligence, 2-110  
Key flexfields  
    Personal Analysis, 2-16

---

## L

Law Enforcement Officers  
    pay calculations, 3-11  
Leadership competencies  
    creating, 5-21  
Legal Authority Codes  
    entering in mass actions, 4-8  
    entering on a Request for Personnel Action,  
    3-18  
LEO  
    *See* Law Enforcement Officers  
Location  
    entering for an office, 2-22  
Lookup types  
    APL\_ASSIGN\_REASON, 1-12  
    APL\_EVENT\_TYPE, 1-10, 5-107  
    APL\_INTERVIEW\_TYPE, 1-13  
    CONTRACT\_STATUS, 2-30  
    CWK\_ASG\_CATEGORY, 2-45  
    CWK\_ASSIGN\_REASON, 2-60  
    EMP\_EVENT\_TYPE, 5-107  
    EMP\_INTERVIEW\_TYPE, 5-106  
    REC\_TYPE, 1-5  
    TERM\_APL\_REASON, 1-15

---

## M

Mailstop  
    entry of, 2-22  
Main appraiser, changing, 5-76  
Manager-level assignments, 2-106  
Marital Status information  
    entry of, 2-19  
Mass actions, 4-1  
    business requirements, 4-5  
    customizing the preview folder, 4-3  
    defining eligibility criteria, 4-2  
    deleting, 4-11  
    deselecting employees, 4-3  
    entering Legal Authority Codes, 4-3, 4-8  
    entering Remarks, 4-3, 4-8  
    error handling, 4-6  
    general procedure, 4-1, 4-6

- printing reports, 4-4, 4-10
- processing, 4-1, 4-6
- processing groups of employees, 4-3
- running the Final action, 4-4, 4-9
- status results, 4-4
- Mass applicant assignment update, 2-63
- Mass assignment update errors
  - reviewing, 2-66
- Mass Realignment
  - processing a, 4-15
- Mass Transfer In
  - Interface table, 4-13
  - processing a, 4-13
- Mass Transfers, 4-6
  - processing, 4-11
- MAX\_ERRORS\_ALLOWED, action parameter, 5-35
- Medical information, 2-29
- Methods of measurement
  - competencies, 5-13

## N

---

- Name
  - changing on a Request for Personnel Action, 3-41
  - entry of additional name information for an employee, 2-22
- National insurance number
  - using as employee number, 2-9
- Nature of Action Codes
  - order of processing, 3-23
- Nature of Action families
  - changing on the Request for Personnel Action, 3-20
- New Hire Reporting
  - setup steps for, 2-107
- New hire reporting, 2-95
  - obtaining, 2-108
- New hire state magnetic media report
  - running the, 2-109
- Not to Exceed
  - effective dates, 3-17
  - RPA actions, 3-41
- Notepad
  - attaching a note to a Request for Personnel Action, 3-19
- Notification of Personnel Action
  - printing, 3-25, 3-28
- NPA
  - See* Notification of Personnel Action
- NTE
  - Not to Exceed, 3-41

## O

---

- Objective assessment templates, 5-89
- Objectives

- aligning, 5-55
- allocating automatically to workers, 5-53
- assessing during an appraisal, 5-91
- cascading, 5-48
- creating, 5-44
- in the Objectives Library, 5-43
- measuring, 5-47
- personal scorecards, 5-57
- setting in parallel, 5-51
- sharing, 5-55
- tracking, 5-48, 5-56
- Office location
  - entry of, 2-22
- Office number
  - entry of, 2-22
- Organizations
  - listing employees assigned to, 2-106
- Other information
  - entering for an employee, 2-22

## P

---

- Participants, appraisal, 5-71
- pay calculations
  - pay banding, 3-10
  - pay caps, 3-11
  - Request for Personnel Action, 3-9
- Pay tables
  - Retained Grade, 3-38
- Payment methods
  - for employee assignments, 2-39
- Payroll code number, 2-10
- Pending actions
  - Request for Personnel Action, 3-30
- People
  - entering additional personal information, 2-20
  - entering as contacts, 2-73
  - entering information, 2-17
  - Extra Information, 2-11
  - in a global enterprise, 2-4
  - managing, 2-1
  - tracking, 2-7
  - window, 2-17
- People folders, 2-102
- People management, 2-1
- People window, 1-12
- Performance Management Plans, 5-36
  - Mass Appraisal Creation for WPM Program, 5-42
  - status values of, 5-40
  - updating, 5-39
- Performance ratings, 5-106
- Person Full History Report
  - Running, 2-101
- Person record synchronization, 2-12
- Person search lists
  - removing title from, 2-63
- Person Summary

- window, 2-26
- Person synchronization report
  - running the, 2-26
- Personal Analysis key flexfield, 2-16
- Personal information
  - deleting, 2-27
  - entering, 2-8
  - entering special information, 2-29
  - entering unstructured information, 5-104
  - I-9, veteran, ethnic origin, 2-21
  - inquiring and reporting on, 2-97, 2-102
  - office location, mailstop, 2-22
  - summarizing personnel data, 2-26
  - tracking roles and activities, 2-7
- Personal Scorecards, 5-57
- Physician's name
  - entry of, 2-23
- Pictures, 2-24
- Placement
  - ending a, 2-70
- Positions
  - listing employees assigned to, 2-104
- Primary assignment statuses
  - for employees, 2-53
- Printing
  - Notification of Personnel Action, 3-25, 3-28
  - Request for Personnel Action, 3-27
- Process Future Dated Actions, 3-32
- Process Log
  - mass actions, 4-6
- Process methods
  - creating a restricted RPA, 3-21
  - RPA restricted form, 3-12
- proficiencies
  - reporting, 5-108
- Proficiency levels, 5-9, 5-12
  - behavioral indicators, 5-9
  - entering for competencies, 5-18
  - unit standard competencies, 5-10
  - using with competencies, 5-10
- Promotions
  - recording information about, 2-36, 2-63

## Q

---

- Qualification Types
  - creating, 5-66
- Qualifications, 5-26
  - recognized establishments, 5-66
- Qualitative measurement of objectives, 5-48
- Quantitative measurement of objectives, 5-47

## R

---

- Rating levels
  - upload third-party, 5-19
- Rating scales, 5-10, 5-12
  - attachments, 5-11

- creating, 5-15
  - default, 5-11
  - entering for competencies, 5-17
  - performance, 5-11
  - proficiency, 5-10
  - unit standard competencies, 5-11
  - upload third-party, 5-19
  - weighting, 5-11
- Recruitment
  - booking events, 1-10
  - business requirements, 1-2
  - defining an activity, 1-5
  - entering applicants, 1-7
  - identifying vacancies, 1-4
  - introduction, 1-1
  - preparation, 1-4
  - tracking applicant progress, 1-9
  - using the people management templates, 1-21
  - work choices, 1-8
- Reduction in Force
  - extending Quick Code values, 4-17
  - printing the Retention Register, 4-18
  - producing a Retention Register, 4-17
  - Retention Register folder, 4-17
- Reference information
  - for a rehire applicant, 2-23
- Refresh
  - data on an RPA, 3-24
- Rehire information, 2-23
- Relocation
  - international preferences, 5-30
  - recording employee preferences, 5-26
- Remarks
  - entering in mass actions, 4-8
  - entering on a Request for Personnel Action, 3-17
- Report
  - new hire state magnetic media, 2-109
- Reports
  - New Hire, 2-95
- reports
  - Assignment Details, 2-97
  - Assignment Status, 2-98
  - Create Federal Special Info Type, 2-28
  - Duplicate Person, 2-101
  - Employee Summary, 2-97
  - Full Applicant Details, 1-9
  - Full Personal Details (report set), 2-97
  - Head Count Detail, 2-99
  - Person Full History, 2-101
  - Person Synchronization, 2-26
  - Requisition summary, 1-16
  - Skills Matching, 5-104
  - Terminations, 2-69
  - Work Details, 2-97
  - Worker Organization Movements, 2-97
  - Workforce Count, 2-100
- reports and processes



- Oracle HRMS, B-1
- Request for Personnel Action
  - approving, 3-25, 3-26
  - canceling, 3-34
  - canceling a future action, 3-35
  - Change in Hours, Work Schedule, Duty Station, 3-40
  - changing NOA families, 3-20
  - Conversion to Appointment Action, 3-42
  - correcting, 3-36
  - correcting future actions, 3-35
  - Correction Action, 3-31
  - displaying refreshed information, 3-26
  - dual actions, 3-19
  - enclosing attachments and notes, 3-19
  - entering dates, 3-17
  - Extra Information, 3-8
  - future actions, 3-31
    - scheduling updates, 3-32
  - history, 3-13
  - intervening actions, 3-30
  - Legal Authority Codes, 3-18
  - masking fields, 3-21
  - mass actions, 4-1
  - Mass Transfer In, 4-13
  - Mass Transfer Out, 4-11
  - name change, 3-41
  - Not to Exceed (NTE) action, 3-41
  - Not to Exceed (NTE) dates, 3-17
  - overview, 3-1, 3-3
  - pay calculations, 3-9
  - printing, 3-27
  - Process Future Dated Actions, 3-32
  - process methods, 3-12
  - processing a future action, 3-30
  - processing an action, 3-15
  - processing mass actions, 4-6
  - processing your own, 3-27
  - refreshing the data, 3-24
  - Remarks, 3-17
  - restricted form, 3-12
  - Retroactive actions, 3-33
  - roles, 3-6
  - security, 3-1, 3-3
  - signing, 3-24, 3-26
  - status of action, 3-13
  - updating, 3-23
  - updating personnel records, 3-25, 3-26
  - window, 3-6
- Requisition summary report, 1-16
- Requisitions, 1-5
  - raising, 1-5
- Resumes, 5-104
  - entry of status information on, 2-22
- Retained Grade
  - processing actions, 3-38
  - Terminating, 3-38
- Retention Register, 4-17

- Retroactive actions
  - processing, 3-33
- Reviews
  - of employee performance, 2-58, 5-105, 5-106
  - of salaries, 2-58
- RIF
  - Reduction in Force, 4-17
- Roles
  - Request for Personnel Action, 3-6
  - valid combinations, 3-6
- RPA
  - See* Request for Personnel Action

## S

---

- Salary basis
  - assigning employees to, 2-58
- Schools and Colleges
  - creating, 5-70
- Scorecards, Personal, 5-57
- Search criteria or results
  - saving to a folder, 2-91
- Secondary assignment statuses, 2-54
- Secondary statuses
  - defining, 2-58
- Security
  - Request for Personnel Action, 3-1, 3-3
  - restricted RPA, 3-21
- Separations, 2-69
- SF-50
  - See* Notification of Personnel Action
  - printing, 3-25
- SF-52
  - Request for Personnel Action, 3-1, 3-3
- Sharing appraisals, 5-71
- Signing
  - Request for Personnel Action, 3-24, 3-26
- Skills information, 2-29
- Skills matching, 1-8, 5-102
- Skills Matching Report, 5-104
- Social security number
  - using as employee number, 2-9
- Special Information Types
  - defining, 5-103
  - definition, 5-102
  - setting up, 2-27
  - skills information, 5-103
  - skills matching, 5-104
- Special information types
  - enabling, 2-28
  - entering, 2-29
  - Federal predefined SITs, 2-28
  - for successor jobs, 5-99
  - for successor positions, 5-99
  - setting up, 2-16, 5-102
- Staffing budgets, 1-4
- Standard work day, 2-60
- State

- New Hire Reporting, 2-108
- Status
  - of assignments, 2-53
- Status values of performance management plans, 5-40
- Succession plans
  - modeling, 5-96
  - modeling based on jobs, 5-99
  - modeling based on positions, 5-99, 5-100, 5-101
  - modeling with LMDA, 5-99
  - ways of holding information, 5-99, 5-99
  - web-based access, 5-99
- Suitability Matching, 5-27
- Supervisor
  - entering on assignments, 2-59
- Switch Manager function, 5-63
- system assignment status, 2-55

## T

---

- Talent management, 5-5
  - overview, 5-1
- Telephone information
  - adding, 2-76
- Template windows
  - user interface, 2-81
- Templates
  - appraisal, 5-87
  - assessment, 5-89
- Termination
  - canceling a termination, 2-71
  - contingent worker, 2-68
  - employee, 2-68
  - of employees, 2-69
  - processing pay after, 2-55
  - Retained Grade, 3-38
  - rules, 2-55
- Terminations Report, 2-69
- Third party payments
  - defining a personal payment method, 2-39
  - entering a payments recipient, 2-79
- Third-party skills
  - upload, 5-19
- Title information
  - entry of, 2-18
- Tracking objectives, 5-48
- Training information, 2-29, 5-105
- Transaction data, purging, 2-66
- Transfers or relocations
  - recording information on, 2-36, 2-63
- Turnover analysis, 2-97
- Types of appraisal, 5-72

## U

---

- Unions
  - recording employee membership of, 2-61
- Updating

- Employee Final Process date, 2-71
- Request for Personnel Action, 3-23
- user assignment status, 2-55
- User statuses
  - renaming, 2-57

## V

---

- Vacancies
  - creating, 1-5
  - entering full applications for, 1-12
  - requisitions for, 1-5, 1-5
  - updating, 1-8
  - viewing, 1-6
- View and Track Objective Progress, 5-56
- Visa related data
  - entering, 2-90

## W

---

- Web ADI
  - upload third-party skills, 5-19
- Windows
  - Address (for Oracle Payroll), 2-75
  - Applicant Entry, 1-11
  - Applicant Interview, 1-10
  - Application, 1-8, 1-12
  - Appraisal Template, 5-95
  - Assessment Template, 5-95
  - Assignment History, 2-107
  - Assignment Statuses, 2-57
  - Assignments Folder, 2-103
  - Book Events, 1-11, 5-105
  - Career Path Name, 5-100, 5-100, 5-101
  - Competence Profile, 5-28
  - Competency Requirements (Core or Generic), 5-22
  - Competency Requirements (No Core or Generic), 5-23
  - Competency Types, 5-20
  - Contact, 2-77
  - Contracts, 2-31
  - Delete Person, 2-27
  - Employee Review, 5-106
  - Event Bookings, 1-10, 5-105
  - Find Competencies, 5-19
  - Find Person, 2-16
  - List Assignments, 2-104
  - List Employees by Organization, 2-106
  - List Employees by Position, 2-104
  - List Employees by Position Hierarchy, 2-105
  - List People by Assignment, 2-104
  - List People by Special Information, 2-106
  - Map Career Path, 5-100
  - Mass Realignment, 4-15
  - Mass Realignment (Position Details), 4-15
  - Mass Realignment (Preview), 4-15
  - Mass Transfer In, 4-13

- Mass Transfer Out, 4-6, 4-11
- Mass Transfer Out (Preview), 4-6, 4-11
- Mass Update of Applicants, 1-8
- People, 1-12, 2-17
- People - Work Choices, 5-30
- People Folder, 2-102
- Person Summary, 2-26
- Personal Payment Method, 2-39
- Picture, 2-24
- Qualifications, 5-68
- Rating Scales, 5-15
- Recruitment Activity, 1-5
- Reduction in Force, 4-17
- Request for Personnel Action, 3-6
- Requisition and Vacancy, 1-8
- Salary Administration, 5-106
- Schools and Colleges Attended, 5-70
- Special Information, 2-29
- Special Information Types, 2-28
- View Vacancies, 1-6
- Within Grade Increase
  - setting up an administrator's groupbox, 4-10
- Work choices
  - employee preferences, 5-30, 5-97
- Work day information, 2-60
- Work schedules
  - employee preferences, 5-26
  - selecting for an employee, 2-22
- Work telephone information
  - entry of, 2-19
- workbooks
  - Competence (Skill) Development Detail, 5-109
  - Employee Anniversary and Birthday Detail, 2-113
  - Employee by Supervisor Status, 2-114
  - Employee Composition Analysis, 2-115
  - Employee Hired or Terminated Detail, 2-116
  - Employee Mailing Address (United States Specific) Detail, 2-117
  - Employee Organization Transfer Detail, 2-118
  - Employee Primary Assignment Detail, 2-119
  - Employee Termination Detail, 2-120
  - Employee Termination with Comments Detail, 2-121
  - Human Resource Setup Analysis, 2-122
  - Person/Assignment History Detail, 2-124
- Worker assignments
  - viewing history of, 2-107
- Workflow groupbox
  - setting up, 4-10
- Workflow Notification
  - appraisals, 5-80
  - sending, 2-90
- workforce
  - count, 2-110
  - gains and losses, 2-110
- Workforce headcount report set, 2-94
- Workforce Performance Management
  - aligning objectives, 5-55
  - automatic allocation of objectives to workers, 5-53
  - cascading objectives, 5-48
  - creating objectives, 5-44
  - manager tasks, 5-60
  - MAX\_ERRORS\_ALLOWED, action parameter, 5-35
  - Objectives Library, 5-43
  - objectives, updating, 5-46
  - overview, 5-31
  - parallel objective-setting, 5-51
  - Performance Management Plans, 5-36
  - personal scorecards, 5-57
  - setting up, 5-34
  - sharing objectives, 5-55
  - Switch Manager function, 5-63
  - tracking objectives, 5-56
  - worker tasks, 5-63

