

Oracle® HR Intelligence

Daily Business Intelligence for HRMS Implementation Guide

Release 11i

Part No. B16023-03

January 2006

Oracle HR Intelligence Daily Business Intelligence for HRMS Implementation Guide, Release 11i

Part No. B16023-03

Copyright © 2004, 2006, Oracle. All rights reserved.

Primary Author: Jo Turner, Gowri Arur, Thomas Atwood, Keith Ekiss, Samuel Thomas

Contributing Author: Raghunath Vydyanath, Justin Hyde, Julian Challenger, Jeffrey Titmas, Nazmeen Arif, Christopher Bridge, Stephen Sherlock, Debasis Dutta, Nagaraj Hunur, HRMSi development team

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software–Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, and PeopleSoft are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

Send Us Your Comments

Preface

1 Daily Business Intelligence for HRMS Setup

HRMS Overview	1-1
Administer Daily Business Intelligence for HRMS	1-1
DBI Responsibilities and Roles	1-2
DBI for HRMS Data Security	1-3
DBI for HRMS Diagnostics Reports	1-3
Information for Non-DBI for HRMS Customers	1-4

2 Implementing Daily Business Intelligence for HRMS

Post Install Steps	2-1
DBI for HRMS - Implementation Flowchart	2-1
Implement People Management Dashboards	2-4
Implement Workforce Budget Management Dashboard	2-10
Implement Open Enrollment Management Dashboard	2-13
Implement Employee Absence Management Dashboard	2-15

3 Deploy DBI for HRMS

Deploy Daily Business Intelligence for HRMS	3-1
Deploy Daily Business Intelligence for HRMS	3-2
Programs to Populate DBI Base Summary Tables	3-2
Checking System Profiles	3-7
Managing Multi-Threading	3-10
Defining Separation Categories	3-11
Categorizing Separation Reasons	3-12
Loading Separation Reasons	3-13
Setting Up the Job Hierarchy	3-14
Structuring the Job Hierarchy	3-16
Checking the Job Hierarchy Setup	3-16
Checking the Job Hierarchy Structure Setup	3-16
Checking the Job Hierarchy database setup	3-17

Setting Up Job Roles	3-17
Setting Up the Length of Work Bands	3-18
Setting Up the Period of Placement Bands	3-19
Setting Up Performance Bands	3-20
Creating a Formula for Performance Review Ratings	3-20
Creating a Formula for Performance Appraisal Ratings	3-21
Updating the Performance Banding Bucket	3-23
Setting Up Area Geography Dimension	3-23
Categorizing Workers.	3-24
Enabling the Payroll Events Model	3-26
Ensuring Triggers are Activated for all Business Groups	3-27
Running the Diagnostics Setup Reports	3-28
Populating the Time Dimension	3-28
Populating the DBI for HRMS Base Summary Tables	3-29

HRMS Glossary

Index

Send Us Your Comments

Oracle HR Intelligence Daily Business Intelligence for HRMS Implementation Guide, Release 11i
Part No. B16023-03

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the title and part number of the documentation and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: appsdoc_us@oracle.com
- FAX: 650-506-7200 Attn: Oracle HRI Documentation Manager
- Postal service:
Oracle HRI Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
USA

If you would like a reply, please give your name, address, telephone number, and electronic mail address (optional).

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Intended Audience

Welcome to Release 11i of the *Oracle HR Intelligence Daily Business Intelligence for HRMS Implementation 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.

- The Oracle Applications graphical user interface.

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

See Other Information Sources for more information about Oracle Applications product information.

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

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise

empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

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

Structure

- 1 Daily Business Intelligence for HRMS Setup**
- 2 Implementing Daily Business Intelligence for HRMS**
- 3 Deploy DBI for HRMS**
- HRMS Glossary**

Related Documents

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle HRMS. You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides. If you require printed guides, you can purchase them from the Oracle store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

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

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

Guides Related to This Product

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 5.6 Framework technologies.

[Oracle Human Resources Management Systems Enterprise and Workforce Management Guide](#)

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

[Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide](#)

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

[Oracle Human Resources Management Systems Payroll Processing Management Guide](#)

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

[Oracle Human Resources Management Systems Compensation and Benefits Management Guide](#)

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

[Oracle Human Resources Management Systems Configuring, Reporting, and System Administration in Oracle HRMS](#)

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

[Oracle Human Resources Management Systems Implementation Guide](#)

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

[Oracle Human Resources Management Systems FastFormula User Guide](#)

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

[Oracle Self-Service Human Resources Deploy Self-Service Capability Guide](#)

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

Implementing Oracle Approvals Management

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

Oracle iRecruitment Implementation Guide

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

Oracle Learning Management User Guide

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

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release *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 *11i*, 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 *11i*. 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 *11i*. You cannot upgrade to Release *11i* 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 *OracleMetalink*.

Oracle Applications Message Manual

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

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.

Daily Business Intelligence for HRMS Setup

HRMS Overview

Oracle Daily Business Intelligence (DBI) for HRMS provides information about your workforce and your human resource management processes. It is a comprehensive reporting solution that provides workforce analysis, and workforce distribution. Built on the proven Oracle Human Resources suite of transactional applications, Daily Business Intelligence for HRMS provides Chief HR Officer, executives, Human Resource line managers, benefits administrators, and budget managers a daily view of the enterprise workforce using management dashboards.

This guide provides you with the basic setup procedures for implementing and maintaining the following dashboards:

- **Chief HR Officer - Overview**
- **Chief HR Officer - Headcount**
- **Chief HR Officer - Turnover**
- **HR Management – Overview**
- **HR Management – Turnover**
- **HR Management – Headcount**
- **Contingent Worker Management**
- **Workforce Budget Management**
- **Open Enrollment Management**
- **Employee Absence Management**

During implementation, follow the steps outlined in the Implementing Daily Business Intelligence for HRMS section, and refer to the detailed procedures in the Deploy Daily Business Intelligence for HRMS section where necessary.

Administer Daily Business Intelligence for HRMS

DBI Responsibilities and Roles

The following table shows the DBI responsibilities and the dashboards that you can access using the responsibilities:

Responsibilities	Dashboards
HR Line Manager	HR Management - Overview
Daily HR Intelligence	HR Management - Headcount HR Management - Turnover Contingent Worker Management Employee Absence Management
Workforce Budget Manager	Workforce Budget Management
Benefits Manager	Open Enrollment Management
Chief HR Officer	Chief HR Officer - Overview Chief HR Officer - Headcount Chief HR Officer - Turnover Contingent Worker Management Employee Absence Management

These responsibilities provide access to all of the associated regions and underlying reports. The reports provide information about subordinate managers found on the supervisor hierarchy. Users who access the dashboards using the HR Line Manager and Daily HR Intelligence can only view the information in their management hierarchy. The Workforce Budget Management dashboard adds an additional filter, using an organization manager hierarchy that restricts the Manager list to display only subordinate managers who own organizations.

Enterprise Level Responsibility

Chief HR Officer

You can access the Chief HR Officer dashboards using the Chief HR Officer responsibility and view the associated KPIs, regions, and reports. This responsibility provides an enterprise level view of key HRMS metrics to help the chief HR officer or head of HR to understand the HR operations in the organization.

Roles

You can delegate access to specific routine tasks and reports to other staff, for example, line or HR managers, using the Daily HR Intelligence and Workforce Budget Manager roles. When you delegate a role, the recipient can log in with the same level of access as the manager, and view the data in the manager's hierarchy using a selected set of dashboards and reports. You can delegate a role for a limited time period. This feature is useful for sharing a large volume of routine HR transactions.

The following DBI for HRMS dashboards use the delegate roles feature:

- HR Management – Overview

- HR Management - Headcount
- HR Management - Turnover
- Contingent Worker Management
- Employee Absence Management
- Workforce Budget Management

The ability to grant roles to other users is part of Oracle Applications' role-based security. See: *Oracle Applications System Administrator's Guide - Security*.

Use the Administer Roles function of the Daily Business Intelligence Administrator responsibility to delegate roles. You can use the List of Grants page to review the existing delegations and then navigate to the Grant Roles page to delegate roles. The Associated Reports column helps you view a list of the reports delegated with a role.

DBI for HRMS Data Security

Daily Business Intelligence for HRMS uses the supervisor hierarchy, based on the association between the assignment and supervisor in the Assignment window, to secure data.

As a worker you are associated with your Oracle Applications user ID. When you log in, the application authenticates your user ID. In the HR Management and the Contingent Worker Management dashboards, you are treated as the top line manager in the Manager parameter.

Once logged in, you can view information about your subordinates in the supervisor hierarchy, but not information about your supervisor or peer managers. To view the HR data at the enterprise level, log in to the application using the Chief HR Officer responsibility. For information on enabling the CEO view for Chief HR Officer, see: Implement DBI for HRMS - People Management, *Daily Business Intelligence for HRMS Implementation Guide*

For the Open Enrollment Status dashboard, the application controls security at the responsibility level, based on the Benefits Manager responsibility that your system administrator assigns to the appropriate users.

For information on standard DBI security, see *Daily Business Intelligence Implementation Guide* on Metalink.

DBI for HRMS Diagnostics Reports

DBI for HRMS provides a diagnostics tool that analyzes your user data and system setup, and reports on potential problems that can affect the DBI reports. The diagnostics tool comprises two reports:

For instructions on running these reports, see *Running the Diagnostics Setup Reports*, page 3-28

HRMSi (DBI) Diagnostics System Setup Report

Prior to running any HRI collection programs, it is important to ensure that DBI for HRMS setup is correct. The aim of the Diagnostics System Setup report is to examine the DBI for HRMS setup and to recommend actions in case of failures.

The report provides information on the following areas of DBI for HRMS setup:

- Profile option settings, and the impact on reporting if you have not set them correctly
- Formulas and dynamic triggers, such as whether they are present where necessary and whether they are enabled and generated
- DBI tables, such as whether the collection programs have successfully populated them
- The structure of Job and Geography hierarchies

If the set up is incorrect, the report recommends appropriate actions.

Run this report at any time during your setup of DBI for HRMS. Run it regularly during DBI for HRMS operations to check your system remains set up correctly.

HRMSi (DBI) Diagnostics Data Setup Report

The Diagnostics Data Setup report tells you about your collected data. You can run this report in two modes:

- Count Mode

The Count mode provides you with a summary of all the objects you report on, such as the total number of people, and the total number of assignments.

- Detail Mode

The Detail mode provides detailed information about the objects you report on. This mode includes two parameters, Section and Subsection. These parameters enable you to choose which reporting area you wish to view, for example, Assignments without a salary, or Salary Total by Supervisor. You must select a section from the Section parameter list, but the Subsection parameter is optional.

Information for Non-DBI for HRMS Customers

The following issues affect HRMS customers who do not use Daily Business Intelligence:

Foundation HR Installation

In a Foundation HR installation the data held on the HR systems is very limited compared with a full HR installation. As a result the data collected by DBI for HRMS processes is very limited:

- HRMS date track (historical changes) not held for assignments.
- PYUGEN not supported.
- Fast Formula not supported.
- Assignment Budget Values not supported.
- Salary related information not collected.
- Historical information not collected.

Non-DBI for HRMS customers, who do not require any more than the basic data collected in a Foundation HR implementation, can set the HRI:DBI Force Foundation HR Processes profile option to Yes. This setting reduces the amount of data collected and improves load times, although functionality is restricted as outlined above.

Full HR Installation

Non-DBI for HRMS customers on a Full HR Installation should review and set the following profile options:

- If you never run the Assignment Events process, set HRI:Populate Assignment Events Queue to No.
- If you never run the Supervisor Hierarchy process, set HRI:Populate Supervisor Hierarchy Events Queue to No.
- If you never run the Supervisor Status History process, set HRI:Populate Supervisor Status History Events Queue to No.

The above settings reduce the load times of other processes.

Implementing Daily Business Intelligence for HRMS

Post Install Steps

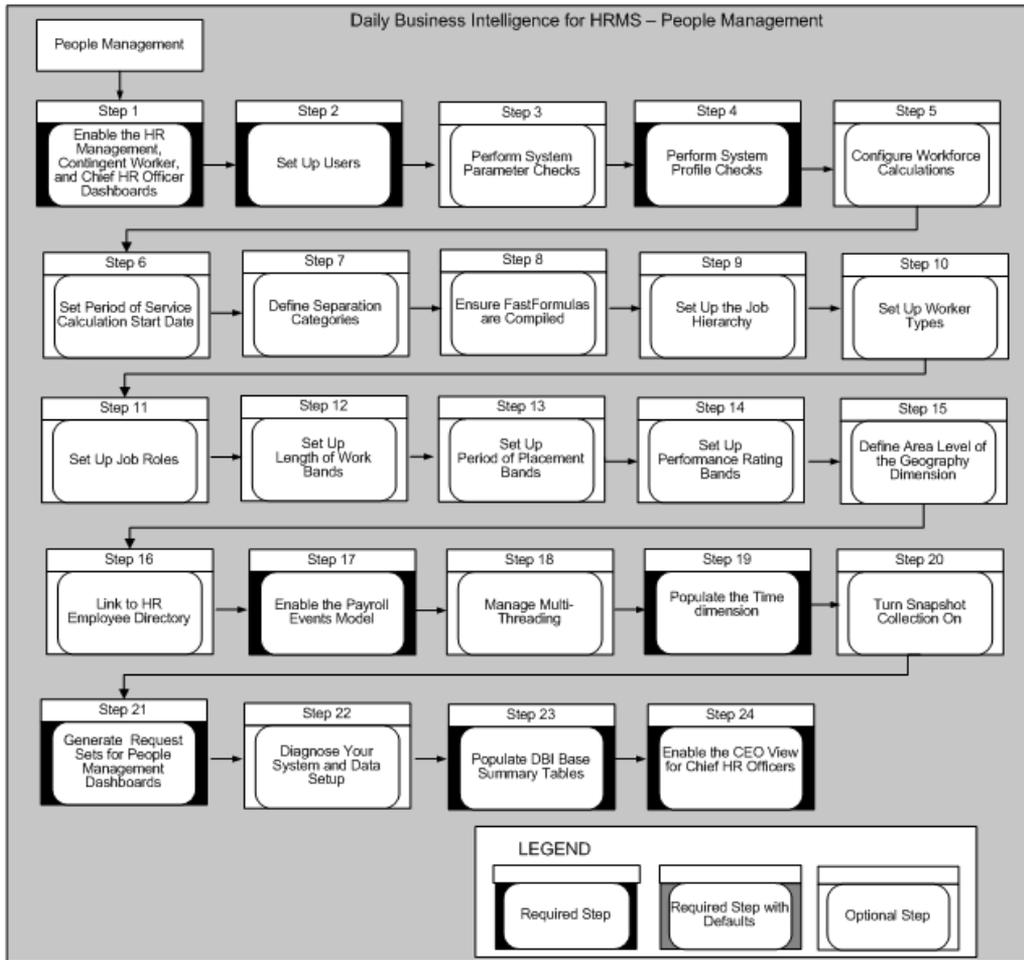
Ensure that your system meets the following prerequisites before you implement Daily Business Intelligence for HRMS.

1. Set up Daily Business Intelligence. See: *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

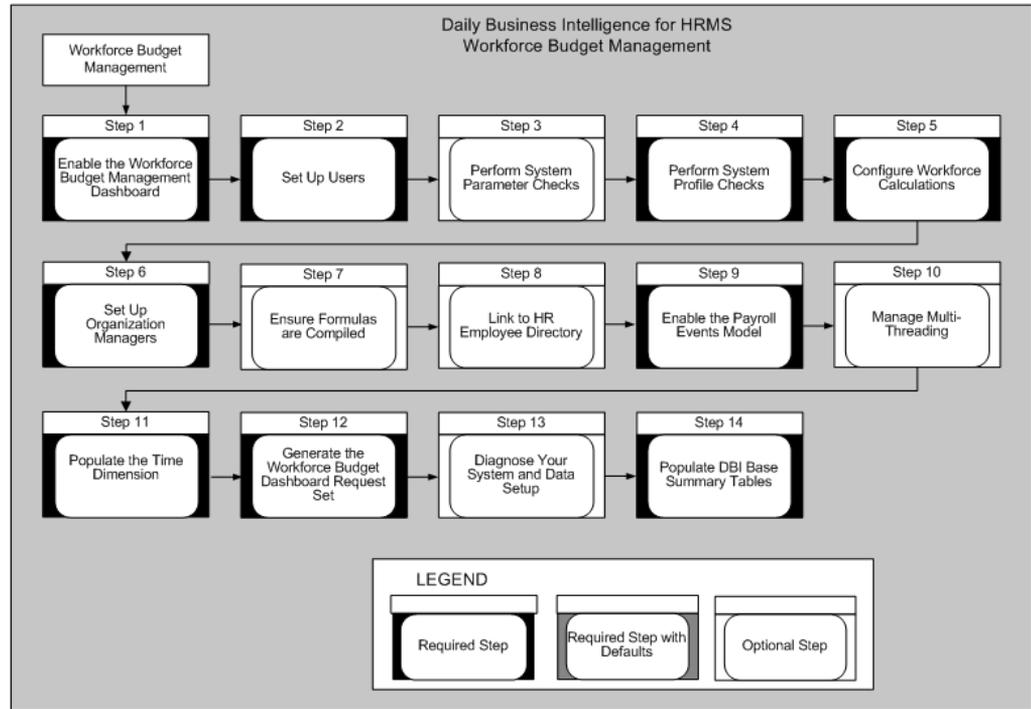
DBI for HRMS - Implementation Flowchart

Some of the steps outlined in this section are Required, and some are Optional. Required with Defaults means that the setup functionality comes with predefined, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change them, you should perform that setup step. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions.

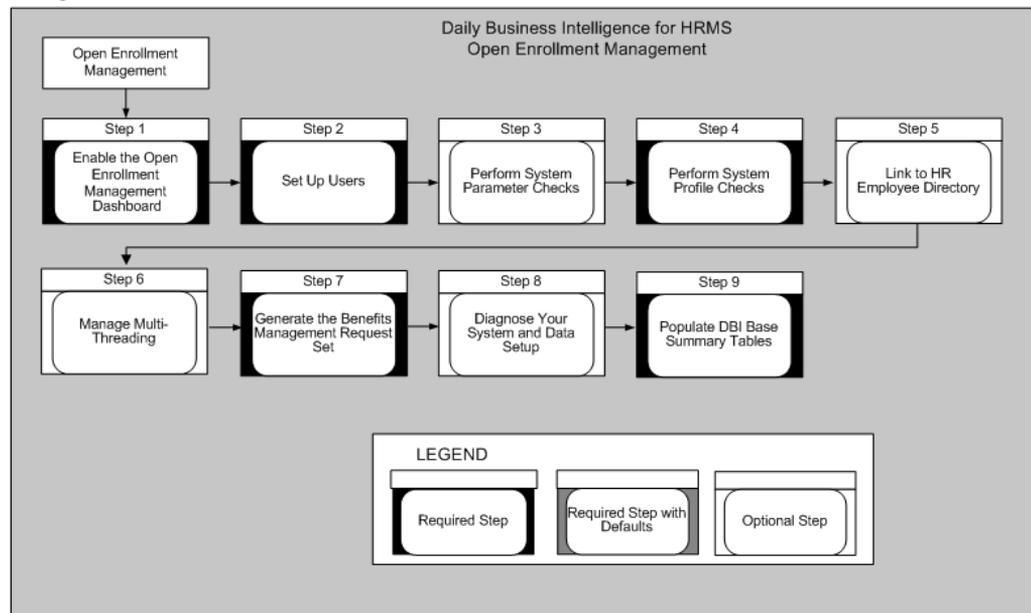
Implementation Flowchart for Daily Business Intelligence for HRMS - People Management



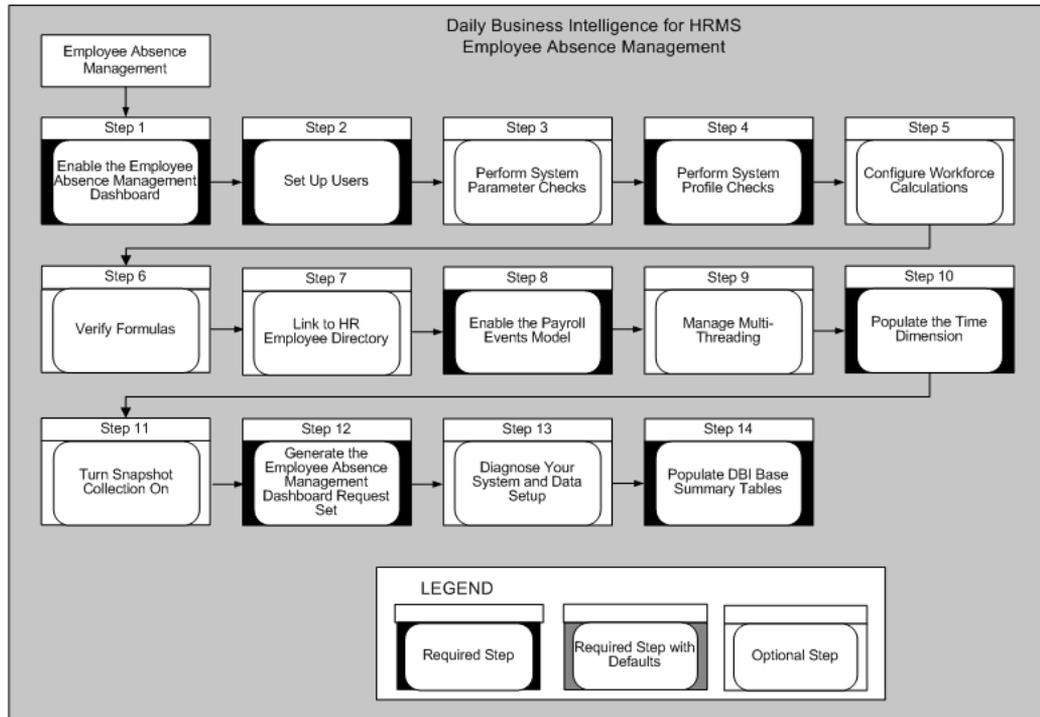
Implementation Flowchart for Daily Business Intelligence for HRMS - Workforce Budget Management



Implementation Flowchart for Daily Business Intelligence for HRMS - Open Enrollment Management



Implementation Flowchart for Daily Business Intelligence for HRMS - Employee Absence Management



Implement People Management Dashboards

Prior to installing Daily Business Intelligence for Human Resources - People Management dashboards, ensure that you have installed release 11i.8 or higher version of the Oracle Human Resources application before you implement Daily Business Intelligence for HR.

You also need to complete the implementation steps for core Daily Business Intelligence. See: *Daily Business Intelligence Implementation Guide* on Metalink.

You need to perform the following implementation steps to use Daily Business Intelligence for Human Resources.

Step 1: Enable the People Management Dashboards **Required Step**

Enable the following dashboards:

- Chief HR Officer - Overview
- Chief HR Officer - Headcount
- Chief HR Officer - Turnover
- HR Management - Overview
- HR Management - Headcount
- HR Management - Turnover
- Contingent Worker Management

See: *Implementing Daily Business Intelligence in Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Step 2: Set Up Users *Required Step*

Use the Users window to assign the Daily Business Intelligence for HRMS responsibility to each user who requires access to the page. You must assign the user to a person to enable them to view dashboards and pages. In the Person field, select the person that you want to associate with the user.

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

Step 3: Perform System Parameter Checks *Optional Step*

The following initialization parameter has a significant impact on the performance of DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_SETTING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks *Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

Use the System Profile Values window.

See: Checking System Profiles, page 3-7

Step 5: Configure Workforce Calculations *Optional Step*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type.

If you have set a budget measurement value for an assignment, reports and performance measures calculate workforce using budget values. Otherwise DBI for HRMS reports calculate workforce using the default TEMPLATE_HEAD formula.

To configure workforce calculations, do one of the following:

- Set Budget Measurement Values

See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*, or

- Replace the default TEMPLATE_HEAD workforce formula with your amended version.

See: Configuring Workforce Calculations Using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 6: Set Period of Service Calculation Start Date *Optional Step*

To calculate the employee's period of service, you can use the hire date of the employee or the adjusted service date that combines the employee's period of service totals. The adjusted service date feature is useful for employees who have not worked continuously in a single business group.

Use the HRI:Period of Service/Placement Date Start Source profile option to identify the date the start date for calculating the period of service.

See: *Checking System Profiles*, page 3-9

For information on entering adjusted service date, see: *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Global)*

Step 7: Define Separation Categories *Optional Step*

DBI for HRMS provides a predefined formula, HR_MOVE_TYPE, that defines separation reasons as voluntary or involuntary. This definition enables DBI to report on the number of employees leaving your enterprise voluntarily or involuntarily.

The formula defines the leaving reasons Gross Misconduct and Deceased as Involuntary. It defines all other reasons as Voluntary.

Amend the HR_MOVE_TYPE formula if you want to change the way the formula attributes your separation reasons to the voluntary or involuntary separation categories.

See: *Defining Separation Categories*, page 3-11

Step 8: Ensure Formulas are Compiled *Optional Step*

You need to verify that the following formulas (or their replacements if you have configured any of them) are compiled:

- TEMPLATE_HEAD
- TEMPLATE_FTE
- HR_MOVE_TYPE_TEMPLATE
- HRI_MAP_WORKER_TYPE
- HRI_MAP_JOB_JOB_ROLE

Use the Formula window.

See: *Writing or Editing a Formula, Oracle HRMS FastFormula User Guide*

Step 9: Set Up the Job Hierarchy *Optional Step*

You can use links in the Salary report to drill down to reports that analyze salaries with job functions and families. For the drill reports to fully function, you need to set up Job Functions and Job Families.

Note: If you do not set up the Job Hierarchy, the drill reports will function, but they will group all jobs within an Unassigned Job Function and Family.

See: *Setting Up the Job Hierarchy*, page 3-14

Step 10: Set Up Worker Types *Optional Step*

Create the formula HRI_MAP_WORKER_TYPE to exclude certain groups of people from DBI reports.

See: Categorizing Workers, page 3-24

Step 11: Set Up Job Roles *Optional Step*

Create the formula HRI_MAP_JOB_JOB_ROLE to categorize people into the appropriate job roles. This feature enables the chief HR officer to compare HR workers with non-HR workers.

Modify the HRI_MAP_JOB_JOB_ROLE formula to change the way the formula attributes the job roles in your enterprise.

See: Setting Up Job Roles, page 3-17

Step 12: Set up Length of Work Bands *Optional Step*

To report on the employee length of service, DBI for HRMS uses the information provided by the Length of Work Banding bucket. This bucket divides the years of service into the following bands:

Name	Range Low Value	Range High Value
< 1 Year	0	12
1 - 3 Years	12	36
3 - 5 Years	36	60
5 - 10 Years	60	120
> 10 Years	120	(no value)

You can change these defaults by updating the band names and the distribution of values.

See: Setting Up Length of Work Bands, page 3-18

Step 13: Set Up Period of Placement Bands *Optional Step*

To report on the contingent worker period of placement, DBI for HRMS uses the information in the Period of Placement bucket. This bucket divides the months of service into the following bands:

Name	Range Low Value	Range High Value
< 3 months	0	3
3 - 6 months	3	6
6 - 12 months	6	12
12 - 24 months	12	24
> 24 months	24	(no value)

You can change these defaults by updating the band names and the distribution of values.

See: Setting Up Period of Placement Bands, page 3-19

Step 14: Set up Performance Rating Bands *Optional Step*

To report on employee performance, DBI for HRMS uses the information provided by the Performance Banding bucket. This bucket divides performance rating percentage values into the following bands:

Name	Range Low Value	Range High Value
Low	0	33
Mid	33	66
High	66	100

You can change these defaults by updating the band names and the distribution of values.

The rating percentage values are derived from a formula that maps your performance ratings to percentage values. You need to create the appropriate formula depending on whether your performance data is in Self-Service, or the Professional User Interface.

If your data is in Self-Service and you do not create the formula, DBI for HRMS uses a default formula. If your data is in the Professional User Interface and you do not create the formula, DBI for HRMS displays the performance ratings as Unassigned.

See: Setting Up Performance Bands, page 3-20

Step 15: Define Area Level of the Geography Dimension *Optional Step*

To enable line managers and the chief HR officer to view report data across areas, you must set up the Area level geography dimension.

See: Setting Up Area Geography Dimension, page 3-23

Step 16: Link to HR Employee Directory *Optional Step*

Line managers and the chief HR officer can navigate directly to specific worker records in the Self-Service HR Employee Directory from the links in the DBI reports. By default this feature is turned off.

To enable managers and the chief HR officer to view worker records, you must:

- Enable the HRI: DBI Link To Transaction System profile option.
See: Checking System Profiles, page 3-7
- Ensure that the Self-Service HR Employee Directory functionality is set up correctly.

See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 17: Enable the Payroll Events Model *Required Step*

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) enables you to limit the incremental data refreshes to only records that have changed in Oracle Human Resources since the last refresh.

Note: If you never incrementally refresh your data, but only perform full refreshes, you do not need to enable the Payroll Events Model.

See: Enabling the Payroll Events Model, page 3-26

Step 18: Manage Multi-threading *Optional Step*

If your system uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-10

Step 19: Populate the Time Dimension *Required Step*

If you have not already populated the Time dimension as part of implementing another intelligence product's request set, you must now populate it with time periods to support the trend reports within DBI for HRMS.

See: Populating the Time Dimension, page 3-28

Step 20: Turn Snapshot Collection On *Optional Step*

Snapshot collection provides faster dashboard rendering for managers of large numbers of employees. If you turn this feature on, the collection process collects an additional summary layer for those managers who have more staff than a specified number reporting to them.

Use two profile options to manage this feature:

- HRI: Collect Manager Snapshots
- HRI: Manager Snapshot Threshold

See: Checking System Profiles, page 3-9

Step 21: Generate Request Sets for the People Management Dashboards *Required Step*

DBI reports are based on data held in base summary tables and materialized views. You populate these structures using programs that are organized into request sets. You need to generate the request sets required by the following pages:

- HR Management - Headcount (HRI_DBI_LINE_MGR_WMV)
- HR Management - Overview (HRI_DBI_OA_LINE_MGR)
- HR Management - Turnover (HRI_DBI_LINE_MGR_TRN)
- Chief HR Officer - Headcount (HRI_DBI_CHO_HDC)
- Chief HR Officer - Overview (HRI_DBI_CHO_OVR)
- Chief HR Officer - Turnover (HRI_DBI_CHO_TRN)
- Contingent Worker Management (HRI_DBI_LINE_MGR_WMV_C)

For information on how to generate the HR Management request sets, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 22: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure both your HRMS system, and your data, are set up correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-28

Step 23: Populate DBI Base Summary Tables *Required Step*

You need to run the HR Management initial load request set in order to populate the underlying tables. After successfully running the initial load request set you can

incrementally collect data by running the HR Management incremental refresh request set.

Use the Submit Requests window.

See: Populating DBI Summary Data Structures, page 3-29

Step 24: Enable CEO View for Chief HR Officers *Required Step*

When you log into DBI for HRMS, your view of workers is restricted by your position in the manager hierarchy. To effectively manage HR using the Chief HR Officer dashboards, a chief HR officer needs to see data for all people within the enterprise.

Use the HRI:DBI Chief HR Officer Named User profile option to enable Chief HR Officers to view the Chief HR Officer dashboards as if they are logged in as the CEO.

Important: You must have successfully run an Initial Load before you set this profile option. This profile option only affects the Chief HR Officer responsibility.

See: Checking System Profiles, page 3-9

Implement Workforce Budget Management Dashboard

Prior to installing Workforce Budget Management Dashboard, ensure that you have installed release 11i.8 or higher of Oracle HRMS.

You also need to complete the implementation steps for core Daily Business Intelligence. See: *Daily Business Intelligence Implementation Guide* on Metalink.

You need to perform the following implementation steps to use the Workforce Budget Management Dashboard.

Important: Implementing HRMS Budgeting is a prerequisite to implementing Workforce Budget Management. You must create money and headcount budgets for each organization on the organization manager hierarchy. Calculations of actual expenditures consider all departments, whether or not they have a budget. Organizations without a budget skew the data, resulting in meaningless comparisons of budgeted and actual amounts.

Step 1: Enable the Workforce Budget Management Dashboard *Required Step*

Enable the Workforce Budget Management Dashboard.

See: Implementing Daily Business Intelligence in *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Step 2: Set Up Users *Required Step*

Use the Users window to assign the Workforce Budget Manager responsibility to each user who requires access to the page.

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

Step 3: Perform System Parameter Checks *Required Step*

The following initialization parameter has a significant impact on the performance of DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_SETTING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks *Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

Use the System Profile Values window.

See: Checking System Profiles, page 3-7

Step 5: Configure Workforce Calculations *Required Step*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type.

If you have set a budget measurement value for an assignment, reports and performance measures calculate workforce using budget values. Otherwise DBI for HRMS reports calculate workforce using the default TEMPLATE_HEAD formula.

To configure workforce calculations, do one of the following:

- Set Budget Measurement Values
See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*, or
- Replace the default TEMPLATE_HEAD workforce formula with your amended version.
See: Configuring Workforce Calculations Using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 6: Set Up Organization Managers *Required Step*

The Workforce Budget Management Dashboard adds an additional filter to the standard Manager list that appears in a dashboard when you choose a subordinate manager. The budget dashboard Manager list displays only those subordinates who own organizations. You must set up this filter by defining a manager for each HR organization that has a budget.

Use the Organization Manager Relationship window.

See: Selecting and Viewing Managers for Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*

Step 7: Ensure Formulas are Compiled *Required Step*

You need to verify that the following formulas (or their replacements if you have configured any of them) are compiled:

- TEMPLATE_HEAD
- TEMPLATE_FTE
- HR_MOVE_TYPE_TEMPLATE

Use the Formula window.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Step 8: Link to HR Employee Directory *Optional Step*

Workforce budget managers can navigate directly to specific worker records in the Self-Service HR Employee Directory from the worker name links in the Workforce Occupancy Details report. By default this feature is turned off.

To enable workforce budget managers to view worker records, you must:

- Enable the HRI:DBI Link To Transaction System profile option.
See: Checking System Profiles, page 3-7
- Ensure that you have set up the Self-Service HR Employee Directory functionality correctly.

See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 9: Enable the Payroll Events Model *Required Step*

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) enables you to limit the incremental data refreshes to only records that have changed in Oracle Human Resources since the last refresh.

Note: If you never incrementally refresh your data, but only perform full refreshes, you do not need to enable the Payroll Events Model.

See: Enabling the Payroll Events Model, page 3-26

Step 10: Manage Multi-Threading *Optional Step*

If your system uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-10

Step 11: Populate the Time Dimension *Required Step*

If you have not already populated the Time dimension as part of implementing another intelligence product's request set, you must populate it with time periods to support the trend reports within DBI for HRMS.

See: Populating the Time Dimension, page 3-28

Step 12: Generate the Workforce Budget Management Request Set *Required Step*

DBI reports are based on data held in base summary tables and materialized views. You populate these structures using predefined programs within request sets. You need

to generate the request set that the Workforce Budget Management Dashboard (HRI_DBI_WBM_PAGE) requires.

For information on how to generate the request set, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 13: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure you have set up both your HRMS system and your data correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-28

Step 14: Populate DBI Base Summary Tables *Required Step*

You need to run the Workforce Budget Management initial load request set in order to populate the underlying tables. After successfully running the initial load request set you can refresh data by scheduling and running the full refresh request set.

Use the Submit Requests window.

See: Populating the DBI for HRMS Base Summary Tables, page 3-29

Implement Open Enrollment Management Dashboard

Prior to setting up the Open Enrollment Management dashboard, you need to complete the implementation steps for core Daily Business Intelligence. See: *Daily Business Intelligence Implementation Guide* on Metalink.

You need to perform the following implementation steps to use the Open Enrollment Management dashboard.

Step 1: Enable the Open Enrollment Management Dashboard *Required Step*

Enable the Open Enrollment Management Dashboard.

See: Implementing Daily Business Intelligence in *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Step 2: Set Up Users *Required Step*

Use the Users window to assign the Benefits Manager responsibility to each user who requires access to the page.

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

Step 3: Perform System Parameter Checks *Optional Step*

The following initialization parameter has a significant impact on the performance of DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_SETTING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks *Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

Use the System Profile Values window.

See: Checking System Profiles, page 3-7

Step 5: Link to HR Employee Directory *Optional Step*

Benefits managers can navigate directly to specific worker records in the Self-Service HR Employee Directory from the worker name links in the reports. By default this feature is turned off.

To enable benefits managers to view worker records, you must:

- Enable the HRI:DBI Link To Transaction System profile option.
See: Checking System Profiles, page 3-7
- Ensure that you have set up the Self-Service HR Employee Directory functionality correctly.

See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 6: Manage Multi-threading *Optional Step*

If your system uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-10

Step 7: Generate the Benefits Management Request Set *Required Step*

DBI reports are based on data held in base summary tables and materialized views. You populate these structures using predefined programs within request sets. You need to generate the request set that the Open Enrollment Management page - HRI_DB_OES_STATUS requires.

For information on how to generate the request set, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 8: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure you have set up both your HRMS system and your data correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-28

Step 9: Populate DBI Base Summary Tables *Required Step*

You need to run the HRI DBI Benefits Initial and Incremental Load request set in order to populate the underlying tables. After successfully running the initial load request set, you can refresh data by scheduling the process and setting the Full Refresh parameter to No.

Use the Submit Requests window.

See: Populating DBI Summary Data Structures, page 3-29

Implement Employee Absence Management Dashboard

Prior to setting up the Employee Absence Management dashboard, complete the implementation steps for core Daily Business Intelligence. See: *Oracle Daily Business Intelligence Implementation Guide* on MetaLink (Note: 334088.1)

Perform the following implementation steps to use the Employee Absence Management dashboard.

Step 1: Enable the Employee Absence Management Dashboard *Required Step*

Enable the Employee Absence Management Dashboard.

See: Implementing Daily Business Intelligence in *Oracle Daily Business Intelligence Implementation Guide* on MetaLink.

Step 2: Set Up Users *Required Step*

Use the Users window to assign the HR Line Manager and Chief HR Officer responsibilities to the appropriate users.

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

Step 3: Perform System Parameter Checks *Optional Step*

The following initialization parameter has a significant impact on the performance of DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_SETTING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks *Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

They include:

- HRI: Absence Duration Units
- HRI: Populate Absence Events Queue
- HRI: Workforce in Period Calculation Method

Use the System Profile Values window.

See: Checking System Profiles, page 3-7

Step 5: Configure Workforce Calculations *Required Step*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type.

If you have set a budget measurement value for an assignment, reports and performance measures calculate workforce using budget values. Otherwise DBI for HRMS reports calculate workforce using the default TEMPLATE_HEAD formula.

To configure workforce calculations, do one of the following:

- Set Budget Measurement Values
See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*, or
- Replace the default TEMPLATE_HEAD workforce formula with your amended version.

See: Configuring Workforce Calculations Using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 6: Verify Formulas *Required Step*

Verify the following formulas (or their replacements if you have configured any of them):

- TEMPLATE_HEAD
- TEMPLATE_FTE
- HR_MOVE_TYPE_TEMPLATE
- TEMPLATE_ABSENCE_DURATION
- LEGISLATION_ABSENCE_DURATION
- BG_ABSENCE_DURATION

Use the Formula window.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Step 7: Link to HR Employee Directory *Optional Step*

Users can navigate directly to specific worker records in the Self-Service HR Employee Directory from the worker name links in the reports. By default this feature is turned off.

To enable users to view worker records, you must:

- Set the HRI:DBI Link To Transaction System profile option to HR Employee Directory.

See: Checking System Profiles, page 3-7

- Ensure that you have set up the Self-Service HR Employee Directory functionality correctly.

See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 8: Enable the Payroll Events Model *Required Step*

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) enables you to limit the incremental data refreshes to records that have changed in Oracle Human Resources since the last refresh.

Note: If you never incrementally refresh your data, but only perform full refreshes, you need not enable the Payroll Events Model.

See: Enabling the Payroll Events Model, page 3-26

Step 9: Manage Multi-threading *Optional Step*

If your application uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-10

Step 10: Populate the Time Dimension *Required Step*

If you have not already populated the Time dimension as part of implementing another intelligence product's request set, you must now populate it with time periods to support the trend reports within DBI for HRMS.

See: Populating the Time Dimension, page 3-28

Step 11: Turn Snapshot Collection On *Optional Step*

Snapshot collection provides faster dashboard rendering for managers of large numbers of employees. If you turn this feature on, the collection process collects an additional summary layer for those managers who have more staff than a specified number reporting to them.

Use two profile options to manage this feature:

- HRI: Collect Manager Snapshots
- HRI: Manager Snapshot Threshold

See: Checking System Profiles, page 3-9

Step 12: Generate Request Sets for the Employee Absence Management Dashboard *Required Step*

DBI reports depend on data in the base summary tables and materialized views. You populate these structures using programs in predefined request sets. Generate the request sets that the Employee Absence Management requires (HRI_DBI_LINE_MGR_ABS).

For information on how to generate the Employee Absence Management request sets, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 13: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure you have set up both your HRMS application and your data correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-28

Step 14: Populate DBI Base Summary Tables *Required Step*

Run the Employee Absence Management initial load request set to load the underlying tables. After successfully running the initial load request set, you can incrementally collect data by running the Employee Absence Management incremental refresh request set.

Use the Submit Request window.

See: Populating DBI Summary Data Structures, page 3-29

Deploy DBI for HRMS

Deploy Daily Business Intelligence for HRMS

Deploy Daily Business Intelligence for HRMS

Use the procedures in this topic in conjunction with the implementation steps to successfully set up Daily Business Intelligence for HRMS.

Programs to Populate DBI Base Summary Tables

HRMSi provides sets of concurrent programs to load and refresh the summary data structures used by the following dashboards:

- People Management
 - Chief HR Officer - Overview
 - Chief HR Officer - Headcount
 - Chief HR Officer - Turnover
 - HR Management - Overview
 - HR Management - Headcount
 - HR Management - Turnover
 - Contingent Worker Management
- Workforce Budget Management
- Open Enrollment Management
- Employee Absence Management

The request sets and programs are detailed below.

Important: Oracle recommends that you do not run these programs separately unless asked to do so by Oracle Support.

HR Management Initial and Incremental Request Set

Use the HR Management Initial request set to load the initial summary data, and fully refresh the base summary tables used by the People Management dashboards.

Use the HR Management Incremental request set to update the summary data, and fast refresh the base summary tables used by the People Management dashboards. The concurrent programs in the HR Management request sets have default parameters set and need not be run separately.

HRI DBI Benefits Initial and Incremental Load Set

Use this request set to populate the base summary tables with all your data for the Open Enrollment Management dashboard.

The concurrent programs included in this request set are:

- HRI Load All Benefits Compensation Objects And Enrollment Periods, page 3-6
- HRI Load All Benefits Eligibility And Election Events, page 3-7
- HRI Load All Benefits Enrollment Actions, page 3-7

Workforce Budget Management Initial Request Set

Use this request set to populate the base summary tables with all your data for the Workforce Budget Management dashboard.

The concurrent programs included in this request set are:

- HRI Load All Labor Cost Actuals (Payroll Costing), page 3-3
- HRI Load All Labor Cost Commitments, page 3-4
- HRI Load All Budgets, page 3-4
- HRI Load All Organization Manager Hierarchies, page 3-4
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments, page 3-4
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy, page 3-5
- HRI Load All Labor Cost Budgets By Organization Manager Hierarchy, page 3-5
- HRI Load All Headcount Budgets By Organization Manager Hierarchy, page 3-5
- HRI Load Summarized Assignment Events by Organization Manager Hierarchy, page 3-6

Employee Absence Management Initial and Incremental Request Set

Use the Employee Absence Management initial request set to load the initial summary data, and fully refresh the base summary tables that the Employee Absence Management dashboard uses.

Use the Employee Absence Management incremental request set to update the summary data, and fast refresh the base summary tables that the Employee Absence Management dashboard uses. The concurrent programs in the Employee Absence Management request sets have default parameters set and need not be run separately.

Workforce Budget Management Initial Request Set Concurrent Programs

The following section provides description of the concurrent programs in the Workforce Budget Management Initial Request Set.

HRI Load All Labor Cost Actuals (Payroll Costing)

The HRI Load All Labor Cost Actuals (Payroll Costing) concurrent program populates the actuals fact table with payroll costing data for the employees.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any costing data change occurring between these dates in the summary table.

This date range initially defaults from the BIS: Global Start Date to the Current System Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the actual fact for the entire collection date range specified.

HRI Load All Labor Cost Commitments

The Load All Labor Cost Commitments concurrent program populates the commitments fact table with the commitment data for the employees in the enterprise.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**
This date range initially defaults from the BIS: Global Start Date to the Current System Date.
- **Full Refresh**
If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the commitment fact for the entire collection date range specified.

HRI Load All Budgets

The HRI Load All Budgets concurrent program populates the budgets fact with both headcount and money budgets defined for the enterprise.

Parameters

This concurrent program has the following parameters:

- **Full Refresh**
If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the budget fact for the entire collection date range specified.

HRI Load All Organization Manager Hierarchies

The HRI Load All Organization Manager Hierarchies concurrent program populates the organization manager hierarchy summary table with the reporting hierarchy of the organization managers defined in the enterprise.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**
If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the organization manager hierarchy summary table for the entire collection date range specified.

HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments

The HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments concurrent program summarizes the commitment and the actual data for the enterprise.

Parameters

This concurrent program has the following parameters:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the combined commitments and actuals summary table for the entire collection date range specified.

HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy

The HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy concurrent program collects the combined commitment and the actual data by organization manager hierarchy.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any commitment data change occurring between these dates in the summary table.

This date range initially defaults from the BIS: Global Start Date to the Current System Date

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the combined commitment and actual data by organization manager hierarchy for the entire collection date range specified.

HRI Load All Labor Cost Budgets By Organization Manager Hierarchy

The HRI Load All Labor Cost Budgets By Organization Manager Hierarchy concurrent program collects the labor cost budget data by organization manager hierarchy.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the labor cost budget data by organization manager hierarchy for the entire collection date range specified.

HRI Load All Headcount Budgets By Organization Manager Hierarchy

The HRI Load All Headcount Budgets By Organization Manager Hierarchy concurrent program collects the headcount budget data by organization manager hierarchy.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the headcount budget data by organization manager hierarchy for the entire collection date range specified.

HRI Load Summarized Assignment Events by Organization Manager Hierarchy

The HRI Load Summarized Assignment Events by Organization Manager Hierarchy collects the assignment data for actual headcount by organization manager hierarchy.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any assignment data for actual headcount by organization manager hierarchy occurring between these dates in the summary table.

This date range initially defaults from the BIS: Global Start Date to the Current System Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the assignment data for actual headcount by organization manager hierarchy for the entire collection date range specified.

HRI DBI Benefits Initial and Incremental Load Set Concurrent Programs

This section provides information about the concurrent programs in the HRI DBI Benefits Initial and Incremental Load Set.

Note: If you want to collect enrollment data for the current enrollment period:

- Set the profile option HRI: Collect Enrollment in Progress to Yes.
- Set the Full Refresh parameter to No for the HRI: Load All Benefits Compensation Objects And Enrollment Periods process.
- Set the Full Refresh parameter to Yes for the other two processes: HRI: Load All Benefits Eligibility And Election Events, and HRI: Load All Benefits Enrollment Actions.

HRI Load All Benefits Compensation Objects And Enrollment Periods

Run the HRI Load All Benefits Compensation Objects And Enrollment Periods concurrent program to populate the compensation object, enrollment period and action type dimension with values.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the dimension again. If you set Full Refresh to No, the program collects data in the incremental mode and inserts changed records without purging the table.

Note: If you want to collect enrollment data for the current enrollment period, set the Full Refresh parameter to No and ensure that you set the profile option HRI Collect Enrollment in Progress to Yes.

HRI Load All Benefits Eligibility And Election Events

This program populates the Benefits Eligibility And Election Events Fact table with eligibility and enrollment information.

Parameters

This concurrent program has the following parameters:

- **Collect From Date**

This parameter defines the start date of the collection range. The Collect From Date defaults to the Last Collected Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates enrollment and election events data again.

If you set Full Refresh to No, the program collects data in the incremental mode and inserts changed records without purging the table.

If you want to collect enrollment data for the current enrollment period, set the Full Refresh parameters to Yes and ensure that you set the profile option HRI Collect Enrollment in Progress to Yes.

HRI Load All Benefits Enrollment Actions

This program populates the Benefits Enrollment Actions Fact table with enrollment action items information.

Parameters

This concurrent program has the following parameters:

- **Collect From Date**

This parameter defines the start date of the collection range. The Collect From Date defaults to the Last Collected Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates enrollment action items data again. If you set Full Refresh to No, the program collects data in the incremental mode and inserts changed records without purging the table.

If you want to collect enrollment action items data for the current enrollment period, set the Full Refresh parameter to Yes and ensure that you set the profile option HRI Collect Enrollment in Progress to Yes.

Checking System Profiles

Before you run DBI reports, check that the relevant system profiles are set up to suit your enterprise.

To check the system profiles for DBI for HRMS:

Use the System Profile Values window.

1. In the Find System Profile Values window, find each of the following system profiles:

System Profile	Description
Workforce Measurement Type	Determines how DBI for HRMS measures the size of your workforce. This application currently only supports the value of Headcount.
HRI: Workforce in Period Calculation Method	<p>This profile option determines the calculation that DBI reports use in averaging values over a period, for example, workforce turnover or average employee absence. Select from:</p> <p>Workforce End: headcount at the end date of the reporting period.</p> <p>Workforce Start + End Average: average of the headcount at the start date and the headcount at the end date of the reporting period.</p>
HRI:Enable Captured Events Archive	This debugging option sets the archive mode for the events capture process. By default, this option is off. If you turn this option on, the system archives all events that trigger incremental processing.
HRI:DBI Force Foundation HR Processes	<p>This profile option enables you to force the HRI Collection Programs to run in Foundation HR mode (on a Full HR Installation). Running in Foundation HR mode reduces the load times. The Foundation HR mode only collects data as of the system date; it does not maintain historical data.</p> <p>The default value is No. DBI for HRMS customers must not set this profile option to Yes.</p>
HRI:Populate Assignment Events Queue	<p>This profile option determines whether the system populates the incremental update queue for the assignment events process.</p> <p>The default value is Yes. DBI for HRMS customers must not set this profile option to No.</p> <p>Non-DBI for HRMS customers who never run the assignment events process, may set this option to No to reduce the load times of other processes.</p>
HRI:Populate Supervisor Hierarchy Events Queue	<p>This profile option determines whether the system populates the incremental update queue for the supervisor hierarchy process.</p> <p>The default value is Yes. DBI for HRMS customers must not set this profile option to No.</p> <p>Non-DBI for HRMS customers who never run the supervisor hierarchy process, may set this option to No to reduce the load times of other processes.</p>
HRI:Populate Supervisor Status History Events Queue	<p>This profile option determines whether the system populates the incremental update queue for the supervisor status history process.</p> <p>The default value is Yes. DBI for HRMS customers must not set this profile option to No.</p> <p>Non-DBI for HRMS customers who never run the supervisor status history process, may set this option to No to reduce the load times of other processes.</p>

System Profile	Description
HRI:Enable Detailed Logging	<p>If you encounter an error during the HRI data collection process, you can use a profile option to include a debug message in the concurrent manager log. Set the HRI:Enable Detailed Logging profile option to Yes. The default is No. Re-run the request sets to generate the error message in the log.</p> <p>Note: Only set this profile option to Yes if you encounter an error. Debugging the collection process impacts the collection timings.</p>
HRI: Collect Manager Snapshots	<p>This profile option determines whether snapshot collection process is on. Snapshot collection provides faster dashboard rendering for managers of large numbers of employees.</p> <p>The default value is Yes.</p>
HRI: Manager Snapshot Threshold	<p>This profile option determines the minimum number of staff required for the snapshot collection of a manager.</p> <p>The default is 2500.</p> <p>Note: Managers with a small number of staff reporting to them will observe no noticeable difference in dashboard rendering, even if they are above the threshold.</p>
HRI:DBI Chief HR Officer Named User	<p>This profile option enables Chief HR Officers to view the Chief HR Officer dashboards as if they are logged in as the CEO.</p> <p>Set the profile option at site level to the name of the CEO of the enterprise. This setting enables users of the Chief HR Officer responsibility to access the Chief HR Officer dashboards effectively as the CEO. Select the name of the CEO from the profile option list. The list shows only those at level 1 (the top of the hierarchy). To turn this profile off, set the profile option value to No.</p>
HRI:Period of Service/ Placement Date Start Source	<p>This profile option determines the date for calculating the employees' period of service. The default value is Start Date. With this setting, DBI for HRMS calculates the period of service from the beginning of employees' current period of service.</p> <p>To calculate the employee's period of service from the beginning of their first period of service, change the value to Adjusted Service Date.</p> <p>Note: HRMS also uses the Adjusted Service Date to calculate benefits. You must therefore consider the effect on benefits if you use this feature.</p> <p>If the Adjusted Service Date is later than the Latest Start of the employee assignment, then DBI for HRMS counts the Latest Start Date to calculate the period of service.</p>

System Profile	Description
HRI:DBI Link To Transaction System	Set this profile option to HR Employee Directory, to enable line managers or the chief HR officer to view specific worker records through the links in the detail reports. The default value is HR Employee Directory. If you do not want managers to access worker records, then set the profile option value to Disable Link.
HRI:Collect Open Enrollment in Progress	Set this profile option to Yes to collect data in full refresh mode for the open enrollments in progress. If you want to collect historic data of enrollments along with the open enrollment data, then set the profile option value to No.
HRI:Enable Benefits Collections and Event Queue	Set this profile option to Yes to enable DBI for HRMS to record any updates to enrollments in the Event Queue tables. When you run the request set in the incremental mode, the application collects the changed enrollment data from these tables to display them in the reports. The default value is No.
HRI:Absence Duration Units	Set this profile option to Days or Hours to determine how the application displays absence duration values. The default value is days.
HRI:Populate Absence Events Queue	Set this profile option to Yes to process new absences related changes in the application. If this option is set to No the Incremental request set will not process any events leading the user to report on old information. The default value is No.

2. Ensure each system profile option is set correctly for your system.

For non-DBI for HRMS customers, further considerations apply. See Information for Non-DBI for HRMS Customers, page 1-4

Managing Multi-Threading

Two profile options enable you to manage multi-threading of processes on multi-processor machines:

- **HRI:Multithreading Chunk Size**

This parameter determines the number of objects processed at one time during the main processing phase. The default value is 200. You can change this to a value between 1 and 16000. However, you should avoid processing a large numbers of objects, and the default value is the result of benchmark tests. If you receive the error "Oracle exception: cannot extend rollback segment" during the collection process, you may want to reduce the value for this profile option.

- **HRI:Number of Threads to Launch**

This parameter determines the number of threads, or sub-processes, that run in parallel on multi-processor machines. If you have already installed PYUGEN on

your system, you should set this profile option to equal the THREADS parameter defined for PYUGEN. The default value for this parameter is 8.

Note: Your Applications System Administrator must define the concurrent manager to allow the required number of sub-processes to run in parallel.

This utility replaces the use of PYUGEN.

To manage multi-threading:

Use the System Profile Values window.

1. In the Find System Profile Values window, find each of the following system profiles:
 - HRI:Multithreading Chunk Size
 - HRI:Number of Threads to Launch
2. Set each system profile option appropriately for your system.

Defining Separation Categories

The Workforce Separations KPI, Daily Business Intelligence for HRMS, and the EDW module of HRMSi use separation categories to count the number of employees leaving either voluntarily or involuntarily.

The formula, HR_MOVE_TYPE_TEMPLATE, categorizes your leaving reasons into voluntary and involuntary separation categories. You define separation categories as lookups of type HR_LOSS_TYPE.

The current categories are:

Lookup Codes and Meanings for HR_LOSS_TYPE (Separation Categories)

Lookup Code	Lookup Meaning
SEP_INV	Involuntary
SEP_VOL	Voluntary
SEP_MTL	Mutual
SEP_NA	Not Specified

Note: Currently the delivered KPIs and reports only support Involuntary and Voluntary as Separation Categories. Classifying Separation Reasons into the other categories (i.e. Mutual and Not Specified) does not affect the reports, so the information in the reports may be incorrect.

You can define separation reasons as any lookup of type LEAV_REAS.

The formula HR_MOVE_TYPE_TEMPLATE categorizes your separation reasons to separation categories. You can replace this formula with your own configured version. The HRI Load Separation Reasons Table concurrent program runs the formula, and stores the results in a table for use when you run a report or KPI.

1. Categorize Separation Reasons

If you want to configure the separation categories, copy the HR_MOVE_TYPE_TEMPLATE formula and save it as HR_MOVE_TYPE. You can then amend the new formula if necessary.

See: Categorizing Separation Reasons, page 3-12

2. Load Separation Reasons

Once you are satisfied with the HR_MOVE_TYPE formula, run the concurrent program HRI Load Separation Reasons Table. You must run this program whether you have changed the formula or not.

See: Loading Separation Reasons, page 3-13

Categorizing Separation Reasons

The HR_MOVE_TYPE_TEMPLATE formula categorizes your Separation Reasons into Separation Categories. Use the formula in conjunction with the HRI Load Separation Reasons Table concurrent program to populate a table. DBI for HRMS gathers separation reasons from this table. This setup provides flexibility and improves performance.

You can configure and extend the HR_MOVE_TYPE_TEMPLATE formula as necessary to categorize new Separation Reasons or re-categorize existing Separation Reasons by copying the template formula and renaming it to HR_MOVE_TYPE.

The important lines in the template formula text are:

- **termtype='V'**

This defaults the separation category to voluntary (V), if a specific leaving reason is not given.

- **IF leaving_reason = 'R' THEN termtype = 'V'**

This ensures that where retirement (R) is given as leaving reason, the formula returns a voluntary (V) separation category.

- **IF leaving_reason = 'D' THEN termtype = 'V'**

This ensures that where death (D) is given as the leaving reason, the formula returns a voluntary (V) separation category.

- **IF leaving_reason = 'G' THEN termtype = 'I'**

This ensures that where gross misconduct (G) is given as the leaving reason, the formula returns an involuntary (I) separation category.

- **RETURN termtype**

Returns the separation category.

If you add a new leaving reason to the formula, you must have previously defined it in the lookup type LEAV_REAS. Leaving reasons are associated with categories, where termtype represents the category. You can only use categories of V for Voluntary, or I for Involuntary.

If you have defined a leaving reason in the lookup type but not added it to the formula, it will default to category V for Voluntary.

Note: The HR_MOVE_TYPE formula is used in a number of other reporting areas. If you change the formula content, those reports will

also change. It is currently being used by Embedded Data Warehouse (EDW). If you have implemented EDW, then changing this formula could affect the collection of data into the EDW fact tables. Please refer to the relevant HRMSi EDW documentation on this.

Perform this optional step from the Setup Business Group.

To categorize Separation Reasons:

You must use a responsibility that has Setup Business Group set for the HR: Business Group profile option.

Use the Formula window.

1. Select the HR_MOVE_TYPE_TEMPLATE formula.
2. Click on Edit and copy the formula body.
3. Create a new formula called HR_MOVE_TYPE.
4. Click on Edit and paste in the HR_MOVE_TYPE_TEMPLATE template contents.
5. Edit the formula code to add new leaving reasons, or re-categorize existing leaving reasons.
6. Compile the new formula.

Whenever you update the formula you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: Populating the DBI Base Summary Tables, page 3-29

Loading Separation Reasons

The HR_MOVE_TYPE_TEMPLATE formula, or its configured version, HR_MOVE_TYPE, categorizes your separation reasons into separation categories. The concurrent program HRI Load Separation Reasons Table runs the formula and stores the results in a table for use when you run report or KPI.

Whether you amend the formula or not, you must run the concurrent program HRI Load Separation Reasons Table.

Note: Both the HRI DBI Update Request Set and the HRI DBI Initial Load Request Set include the HRI Load Separation Reasons Table concurrent program. The program therefore runs automatically when you run either of these request sets.

To Load Separation Reasons:

Use the Submit Requests window.

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load Separation Reasons Table.
3. Submit your request.

What's Next

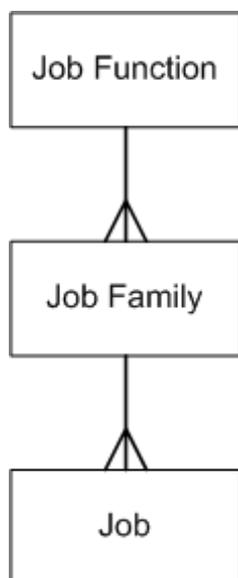
After implementation, only run the HRI Load Separations Reasons Table concurrent program after changes to the HR_MOVE_TYPE formula.

Note: If you implement EDW, do not schedule the HRI Load Separation Reasons Table process to run regularly. Run this process only as needed when you understand the full implications on the Workforce Separation fact re-collection. See: Processes to Populate the Data Warehouse Module, *Oracle HRMS Deploy Strategic Reporting (HRMSi)*

Setting Up the Job Hierarchy

You can use links in the Salary report to drill to more detailed reports.

For the drill reports from the Salary report to fully function, you need to set up Job Functions and Job Families within a hierarchical structure. Job Function is the parent of Job Family, and Job Family is the parent of Job.



Oracle DBI for HRMS associates a Job Family with a Job Function if a Job is associated with both the Job Family and the Job Function. You define both Job Function and Job Family using segments in the Job key flexfield or descriptive flexfield. Typically, you set up Job Family as dependent on Job Function.

When you drill from the Job Function to the Job Family report, the report displays only those Job Families that are associated with the Job Function.

1. Define Job Function and Job Family value sets

If you have not done so already, define Job Function and Job Family value sets for the Job key flexfield, or a Job descriptive flexfield.

Select one of the following Validation Types for each value set:

- **Table:** The validation SQL must be valid and the WHERE clause cannot contain any non-contextual conditions (these can be pushed into the underlying object using a view).

- **Independent:** You can use this validation type for the Job Function value set, instead of Table validation type.
- **Dependent:** If you used Independent validation type for Job Function, you can use this validation type for the Job Family value set.

Note: If you add or remove Job Family or Job Function values in the future, run HR Management Initial Request Set or HR Management Incremental Request Set to update the DBI base tables. See: *Populating DBI Summary Data Structures*, page 3-29

Use the Value Sets window.

See: *Defining Value Sets, Oracle Applications Flexfields Guide*

2. **Define the Job Flexfield Structure**

If you have not done so already, associate the Job Family and Job Function value sets with either the Job key flexfield, or a Job descriptive flexfield.

HRMS uses the Job key flexfield values as part of the job name throughout HRMS; if you use the Job descriptive flexfield, HRMS will not incorporate the job family and job function values into the job name.

Note: Job value sets linked to a key flexfield take precedence over those linked to descriptive flexfields. If you have a Job value set linked to one or more Job key flexfields, the application will not use any value sets linked to a Job descriptive flexfield. However, you can link a Job family value set to the key flexfield and a Job function value set to the descriptive flexfield and vice versa.

Associate the Job Family value set with the Job flexfield segment that holds the Job Family. Associate the Job Function value set with the Job flexfield segment that holds the Job Function.

Use the Key Flexfield Segments window or the Descriptive Flexfield Segments window.

See: *Defining Key Flexfield Structures, Oracle Applications Flexfields Guide* and *Defining Descriptive Flexfield Structures, Oracle Applications Flexfields Guide*

3. **Structure the Job Hierarchy**

Associate your Job Family and Job Function value sets with the HR: BIS Job Hierarchy – Job Grouping Level 1 and the HR: BIS Job Hierarchy – Job Grouping Level 2 profile options to structure your Job hierarchy.

Use the System Profile Values window.

See: *Structuring the Job Hierarchy*, page 3-16

4. **Associate Jobs with a Job Family and Job Functions**

To structure your jobs within the Job hierarchy, you need to associate each job with a Job Family and a Job Function. Use the Job Name field of the Job window.

See: *Defining a Job, Oracle HRMS Enterprise and Workforce Management Guide*

5. **Check the Job Hierarchy Setup**

If you selected Table validation of your value sets, check your Job Function and Job Family hierarchy setup. To check the setup, populate the database tables and

views. You can then query the associated views to ensure they have been populated with job function and job family values, and check that their performance is efficient.

See: *Checking the Job Hierarchy Setup*, page 3-16

Structuring the Job Hierarchy

Use your Job Family and Job Function value sets to structure your Job Hierarchy.

Use the HR: BIS Job Hierarchy – Job Grouping Level 1 profile option to define your Job Function value set as the first level in the Job hierarchy. Use the HR: BIS Job Hierarchy – Job Grouping Level 2 profile option to define your Job Family value set as the second level.

To associate value sets with profile options:

Use the System Profile Values window.

1. In the Find System Profile Values window, find the HR: BIS Job Hierarchy – Job Grouping Level 1 Profile Option.
2. At Site Level, enter the name of your Job Function value set.
3. In the Find System Profile Values window, find the HR: BIS Job Hierarchy – Job Grouping Level 2 Profile Option
4. At Site Level, enter the name of your Job Family value set.

Checking the Job Hierarchy Setup

Perform this check if you selected Table validation of your Job Function and Job Family value sets. To check your Job Function and Job Family hierarchy setup, populate the database tables and views by running the HRI Load All Job Hierarchies process.

Note: You only need to run this process to check your setup. You normally populate the Job Hierarchy when you run the HR Management Initial Request Set and the HR Management Incremental Request Set. See: *Programs to Populate DBI Summary Data Structures*, page 3-2

You can then query the associated views to ensure they have been populated with job function and job family values, and check that their performance is efficient.

Be aware that if you did not associate Jobs with a given Job Family or Function, when you drill on the Headcount value on the Salary report, the Job Function column may have the value of Unassigned.

1. Check the Job Hierarchy structure setup.

See: *Checking the Job Hierarchy Structure Setup*, page 3-16

2. Check the Job Hierarchy database setup.

See: *Checking the Job Hierarchy Database Setup*, page 3-17

Checking the Job Hierarchy Structure Setup

Once you have set up the Job hierarchy, if you are using table validation of the value sets, check your Job Function and Job Family hierarchy setup. To check the Job Hierarchy

structure, populate the database tables and views by running the HRI Load All Job Hierarchies process.

To check the Job Hierarchy structure setup:

Use the Submit Requests window.

1. Run the HRI Load All Job Hierarchies process in full refresh mode.
2. Check the process log for errors and warnings.

Checking the Job Hierarchy database setup

Once you have checked the Job hierarchy structure, if you are using table validation of the value sets, check the Job Hierarchy database setup.

Check the performance of the views derived from the validation SQL by analyzing:

```
SELECT * FROM hri_cl_job_family_v WHERE id = :id;  
SELECT * FROM hri_cl_job_function_v WHERE id = :id;
```

Setting Up Job Roles

Create a QuickPaint formula named HRI_MAP_JOB_JOB_ROLE to identify job roles in your enterprise. This formula enables DBI categorize people in your enterprise into the appropriate job role and helps the chief HR officer distinguish HR workers from other workers.

DBI for HRMS uses the formula during the collection process to populate the dimension level HRMS Job Role. You must create this formula in the delivered Setup Business group.

To create a formula to identify job roles:

1. For the Setup business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Select QuickPaint as the formula type.
4. Choose the Edit button to open a blank Edit Formula window.

Use the following sample formula as a guide. The formula determines job role from the job family, job function, or a combination of both. The sample formula returns job role as HR for the following cases:

- Job family code is RECRUIT and job function code is SEARCHING.
- Job family code is PAYROLL and job function code is undefined.
- Job family code is HR.

The sample formula categorizes all other job family and job function combinations as non-HR.

The formula must have the following inputs:

- job_family_code

- job_function_code

The formula must have the following output:

job_role_code

Note: Currently, the output from the formula must be either HR or NA_EDW. The application automatically changes all other outputs to NA_EDW.

HRI_MAP_JOB_JOB_ROLE Sample Formula

```

INPUTS ARE job_family_code (text), job_function_code (text)
DEFAULT for job_family_code IS 'NA_EDW'
DEFAULT for job_function_code IS 'NA_EDW'
job_role_code = 'NA_EDW'

IF job_family_code = 'RECRUIT' AND job_function_code = 'SEARCHING'
THEN ( job_role_code = 'HR' )
ELSE IF job_family_code = 'PAYROLL' AND job_function_code = 'NA_ED
W'
THEN ( job_role_code = 'HR' )
ELSE IF job_family_code = 'HR'
THEN ( job_role_code = 'HR' )
ELSE ( job_role_code = 'NA_EDW' )

RETURN job_role_code

```

5. Click Verify button to compile the formula.
6. Save your work.

Whenever you update the formula you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: *Populating the DBI Base Summary Tables*, page 3-29

Setting Up the Length of Work Bands

DBI for HRMS uses the Business Intelligence Bucketing utility to divide the number of months that employees have worked into bands. The Human Resources Intelligence - Length of Work Banding bucket contains the following default bands:

Name	Range Low Value	Range High Value
< Year	0	12
1 - 3 Years	12	36
3 - 5 Years	36	60
5 - 10 Years	60	120
> 10 Years	120	(no value)

You cannot add new bands, but you can update the band names and the distribution of values.

Important: If you update the band values, you must set the lower limit of lowest band to 0, and you must leave the higher limit of highest band open (no value).

To update Length of Work Bands:

1. Use the Daily Business Intelligence Administrator responsibility to navigate to the Buckets window.
2. Search for Human Resources Intelligence - Length of Work Banding.
3. Click the Edit icon to update the Human Resources Intelligence - Length of Work Banding bucket.
4. Apply your changes.

Whenever you update the Length of Work bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the HR Management dashboards. See Populating the DBI Base Summary Tables, page 3-29

Setting Up the Period of Placement Bands

DBI for HRMS uses the Business Intelligence Bucketing utility to divide the number of months that contingent workers have worked into bands. The Human Resources Intelligence - Period of Placement Banding bucket contains the following default bands:

Name	Range Low Value	Range High Value
< 3 months	0	3
3 - 6 months	3	6
6 - 12 months	6	12
12 - 24 months	12	24
> 24 months	24	(no value)

You cannot add or delete bands, but you can update the band names and the distribution of values.

To update the Period of Placement Bands:

1. Use the Daily Business Intelligence Administrator responsibility to navigate to the Buckets window.
2. Search for Human Resources Intelligence - Period of Placement Banding.
3. Click the Edit icon to update the Human Resources Intelligence - Period of Placement Banding bucket.
4. Apply your changes.

Whenever you update the Period of Placement bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the Contingent Worker Management dashboards. See: Populating the DBI Base Summary Tables, page 3-29

Setting Up Performance Bands

DBI for HRMS uses the Business Intelligence Bucketing utility to divide HRMS Performance ratings into bands. The Performance Band bucket is called Human Resources Intelligence Performance Banding, and has the following default bands:

Name	Range Low Value	Range High Value
Low	0	33
Mid	33	66
High	66	100

You cannot add or delete bands, but you can update the band names and the distribution of values.

Whenever you update the Performance bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: *Populating the DBI Base Summary Tables*, page 3-29

The range values represent percentage values of employee performance ratings.

DBI for HRMS cannot use employee performance ratings directly. You need to create a formula to map your performance ratings to percentage values. You need to create one of two formulas, depending on whether you collect employee Performance ratings using:

- Performance Reviews (Professional User Interface), or
 - Appraisals (Self-Service).
1. If you collect performance ratings for performance reviews using the Professional User Interface, you need to create a formula to capture your performance review ratings into bands. If you do not set up this formula, DBI reports display performance rating as Unassigned.
See: *Creating a Formula for Performance Review Ratings*, page 3-20
 2. If you collect performance ratings for appraisals using Self-Service, you need to create a formula to capture your performance appraisal ratings into bands. However, if you do not create this formula for all business groups, the HRI_GENERATE_FAST_FORMULA process, which is part of the request set for HR Management dashboards, automatically generates a formula to transform your performance ratings into percentage values. This process only generates a formula for business groups that have employees.
See: *Creating a Formula for Performance Appraisal Ratings*, page 3-21
 3. You can update the Performance Banding bucket to redistribute your performance rating percentage values across the bands.

See: *Updating the Performance Banding Bucket*, page 3-23

Creating a Formula for Performance Review Ratings

If you collect performance ratings for performance reviews, using the Professional User Interface, you need to create the NORMALIZE_REVIEW_RATING formula. You need to create this formula in the Setup business group.

In the formula, specify the percentage rating for each performance rating. You should aim to distribute the performance ratings evenly across the three performance bands. For example, assuming you use the default band values, if there are five performance ratings and one rating is low, two are mid values, and two are high values, you need to ensure that the low rating falls between 0-33, the mid ratings need a range between 33-66, and high between 66-100. At any given point in time only 1 performance rating is valid for a person.

To create a formula for Performance Review Ratings:

1. For the Setup business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter NORMALIZE_REVIEW_RATING as the formula's name.
4. Select QuickPaint as the formula type.
5. Choose the Edit button to open a blank Edit Formula window.
6. Use the following sample formula as a guide. Evaluate each appraisal in the business group to decide whether you want to include it in the DBI for HRMS performance reports. For each appraisal you want to include (SKIP_REVIEW = 'N'), match the ratings to your appraisal ratings, and set the NORMALIZED_RATING values (percentages) as appropriate to achieve an even spread of ratings across the Performance bands.

NORMALIZE_REVIEW_RATING Sample Formula

```

INPUTS are APPRAISAL_TEMPLATE_NAME (Text), RATING (text)
DEFAULT for APPRAISAL_TEMPLATE_NAME is 'SKIPPP'
DEFAULT for RATING is '0'
SKIP_REVIEW = 'Y'

IF APPRAISAL_TEMPLATE_NAME = 'Annual Performance Appraisal' THEN
( SKIP_REVIEW = 'N'
IF RATING = 1 THEN (NORMALIZED_RATING = 1)
IF RATING = 2 THEN (NORMALIZED_RATING = 25)
IF RATING = 3 THEN (NORMALIZED_RATING = 50)
IF RATING = 4 THEN (NORMALIZED_RATING = 75)
IF RATING = 5 THEN (NORMALIZED_RATING = 100 )
)

IF APPRAISAL_TEMPLATE_NAME = 'Competence Rating Assessment' THEN
( SKIP_REVIEW = 'Y' )

RETURN SKIP_REVIEW, NORMALIZED_RATING

```

7. When you finish writing the formula, choose the Verify button to compile it.
8. When the formula is verified successfully, save it.

Creating a Formula for Performance Appraisal Ratings

If you collect performance ratings for appraisals using Self-Service, you need to create the NORMALIZE_APPRAISAL_RATING formula. You need to create this formula for each business group. However, if you do not create this formula for all business

groups, the HRI_GENERATE_FAST_FORMULA process, which is part of the request set for HR Management dashboards, automatically transforms your performance ratings into percentage values.

In the formula, specify the percentage rating for each performance rating. You should aim to distribute the performance ratings evenly across the three performance bands. For example, assuming you use the default band values, if there are five performance ratings and one rating is low, two are mid values, and two are high values, you need to ensure that the low rating falls between 0-33, the mid ratings need a range between 33-66, and high between 66-100. At any given point in time only 1 performance rating is valid for a person.

1. For each business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter NORMALIZE_APPRAISAL_RATING as the formula's name.
4. Select QuickPaint as the formula type.
5. Choose the Edit button to open a blank Edit Formula window.
6. Use the following sample formula as a guide. Evaluate each appraisal in the business group to decide whether you want to include it in the DBI for HRMS performance reports. For each appraisal you want to include (SKIP_REVIEW = 'N'), match the ratings to your appraisal ratings, and set the NORMALIZED_RATING values (percentages) as appropriate to achieve an even spread of ratings across the Performance bands.

NORMALIZE_APPRAISAL_RATING Sample Formula

```
INPUTS are REVIEW_TYPE (Text), RATING (text)
DEFAULT for REVIEW_TYPE is 'ANN'
DEFAULT for RATING is '0'
SKIP_REVIEW = 'Y'
NORMALIZED_RATING = -1

IF REVIEW_TYPE = 'ANN' THEN
( SKIP_REVIEW = 'N'
IF RATING = '1' THEN (NORMALIZED_RATING = 20)
IF RATING = '2' THEN (NORMALIZED_RATING = 40)
IF RATING = '3' THEN (NORMALIZED_RATING = 60)
IF RATING = '4' THEN (NORMALIZED_RATING = 80)
IF RATING = '5' THEN (NORMALIZED_RATING = 100)
)

IF REVIEW_TYPE = 'EXIT' THEN
( SKIP_REVIEW = 'Y' )

RETURN SKIP_REVIEW, NORMALIZED_RATING
```

7. When you finish writing the formula, choose the Verify button to compile it.
8. When the formula is verified successfully, save it.

Updating the Performance Banding Bucket

The Performance Band bucket, Human Resources Intelligence Performance Banding, maps the percentage values from the NORMALIZE_APPRAISAL_RATING formula, or the NORMALIZE_REVIEW_RATING formula, to performance bands for use in DBI for HRMS reports.

The Performance Band bucket has the following default bands:

Name	Range Low Value	Range High Value
Low	0	33
Mid	33	66
High	66	100

You cannot add new bands, but you can update the band names and the distribution of values.

To update the Performance Bands:

1. Use the Daily Business Intelligence Administrator responsibility to navigate to the Buckets window.
2. Search for Human Resources Intelligence - Performance Banding.
3. Click the Edit icon to update the Human Resources Intelligence - Performance Banding bucket.
4. Apply your changes.

Whenever you update the Performance bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the HR Management dashboards. See Populating the DBI Base Summary Tables, page 3-29

Setting Up Area Geography Dimension

To view report data across areas, you must set up the Geography dimension. If you use HRMSi Analytics reports you may already have defined the Geography dimension. DBI for HRMS only requires you to define the Area to Country dimension levels. (Analytics reports use the Region level as well.)

To define the Area and Country levels of the Geography dimension, you first need to define your areas. Country is an existing dimension and is already defined in Oracle Applications. Once you have defined your areas, you need to assign countries to your areas.

To define areas:

1. Log in to the Daily Business Intelligence Administrator responsibility.
2. Click Define Geography Dimension link in the Setup: Global menu.
3. Click Create Area in the Area page.
4. Add desired areas, for example, North America, EMEA, or Asiapac.
5. Click Apply to save your work

To assign countries to areas:

You can add countries after you create areas or add countries to areas later.

1. Navigate to the Area page.
2. Search an area that you have created.
3. Click Update to add countries to your area.
4. In the Update Area page, select the countries you want to associate with the selected area.

Note: Ensure that the HR location has a valid address style defined in the Location window of Oracle HRMS. Otherwise the country/area appears as Unassigned, when managers view reports using the Area/Country parameter or View by.

5. Repeat for other areas as necessary.
6. Save your work.

Categorizing Workers

Create a QuickPaint formula named HRI_MAP_WORKER_TYPE to exclude certain people groups from DBI reports. Use this formula to specify which person types in each business group you want to report on. DBI for HRMS uses the formula during the collection process.

The formula returns a value for each person type to specify whether to include the person type in the reports. In addition, it returns a value to specify the category of each person type.

To create a formula to categorize workers:

1. For the Setup business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter HRI_MAP_WORKER_TYPE as the formula name.
4. Select QuickPaint as the formula type.
5. Choose the Edit button to open a blank Edit Formula window.

Use the following sample formula below as a guide. The formula determines the worker type and sub-types, and whether or not to include a person in the reports.

The formula must have the following inputs:

- system_person_type
- user_person_type
- primary_flag
- employment_category
- assignment_type

Note: The Employment Category input corresponds to the Assignment Category field in the Assignment window of Oracle HRMS.

The formula must have the following outputs:

include_in_reports

The formula may have the following outputs:

- worker_type_lvl1
- worker_type_lvl2

These optional outputs are for future use to further group person types, for example into permanent or temporary employees, or into long-term or short-term employees.

HRI_MAP_WORKER_TYPE Sample Formula

INPUTS ARE

```
system_person_type (text),  
user_person_type (text),  
employment_category (text),  
primary_flag (text),  
assignment_type (text)
```

```
DEFAULT FOR system_person_type IS 'NA_EDW'  
DEFAULT FOR user_person_type IS 'Unassigned'  
DEFAULT FOR employment_category IS 'NA_EDW'  
DEFAULT FOR primary_flag IS 'NA_EDW'  
DEFAULT FOR assignment_type IS 'NA_EDW'
```

```
include_in_reports = 'Y'  
worker_type_lvl1 = 'NA_EDW'  
worker_type_lvl2 = 'NA_EDW'
```

```
IF ((employment_category = 'PR' OR employment_category = 'PT') AND  
worker_type = 'EMP')
```

```
THEN
```

```
worker_type_lvl1 = 'PART'
```

```
ELSE
```

```
worker_type_lvl1 = 'FULL'
```

```
IF (employment_category = 'FT' OR employment_category = 'PT') THEN
```

```
worker_type_lvl2 = 'TEMP'
```

```
ELSE
```

```
worker_type_lvl2 = 'PERM'
```

```
RETURN include_in_reports, worker_type_lvl1, worker_type_lvl2
```

6. When you finish writing the formula, choose the Verify button to compile it.

7. When the formula is verified successfully, save it.

Whenever you update the formula you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: Populating the DBI Base Summary Tables, page 3-29

Enabling the Payroll Events Model

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) can limit data refreshes to new or changed records in Oracle Human Resources since the last refresh.

Complete the following procedures to enable the Payroll Events Model:

1. Enable Dynamic Triggers

Ensure that the triggers that update the summary data structures are uploaded and compiled. These triggers may not be enabled or compiled if you have installed HR in standalone mode, or if you are not using Salary Administration to maintain salaries.

Enable each of the following dynamic triggers, enable the trigger components for each trigger, and regenerate the triggers.

Application Name	Table Name	Triggering Actions
Oracle Human Resources	PER_ALL_ASSIGNMENTS_F	Update, Insert, Delete
Oracle Human Resources	PER_ASSIGNMENT_BUDGET_VALUES_F	Update, Insert, Delete
Oracle Human Resources	PER_PERIODS_OF_SERVICE	Update
Oracle Human Resources	PER_PAY_PROPOSALS	Update, Insert, Delete
Oracle Human Resources	PER_PERFORMANCE_REVIEWIEWS	Update, Insert, Delete
Oracle Human Resources	PER_APPRAISALS	Update
Oracle Payroll	PAY_ELEMENT_ENTRIES_F	Update, Insert, Delete
Oracle Human Resources	PER_PERIODS_OF_PLACEMENT	Update
Oracle Human Resources	PER_PERSON_TYPE_USAGES_F	Insert, Delete, Update
Oracle Human Resources	PER_ALL_ASSIGNMENTS_F	Insert, Delete, Update
Oracle Human Resources	PER_ABSENCE_ATTENDANCES	Insert, Delete, Update

Use the Dynamic Trigger Generation window.

See: *Defining Dynamic Triggers, Oracle HRMS Payroll Processing Management Guide*

2. Activate Triggers for All Business Groups

Ensure the triggers that update your summary data structures are activated for all business groups.

Use the Functional Area Maintenance window.

See: *Ensuring Triggers are Activated for all Business Groups, page 3-27*

Ensuring Triggers are Activated for all Business Groups

The following triggers update summary data structures with your changed records. Ensure they are activated for all business groups.

To ensure triggers are activated for all business groups:

Use the Functional Area Maintenance window.

1. In Query Mode, enter INCIDENT REGISTER in the Functional Area Name field.
2. Run the query.
3. In the Trigger Name field, find each of the following triggers:
 - PER_PERFORMANCE_REVIEWS_ARI
 - PER_PERFORMANCE_REVIEWS_ARU
 - PER_PERFORMANCE_REVIEWS_ARD
 - PER_APPRAISALS_ARU
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARD
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARI
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARU
 - PER_PAY_PROPOSALS_ARD
 - PER_PAY_PROPOSALS_ARI
 - PER_PAY_PROPOSALS_ARU
 - PER_ALL_ASSIGNMENT_F_ARD
 - PER_ALL_ASSIGNMENT_F_ARI
 - PER_ALL_ASSIGNMENT_F_ARU
 - PAY_ELEMENT_ENTRIES_F_ARD
 - PAY_ELEMENT_ENTRIES_F_ARI
 - PAY_ELEMENT_ENTRIES_F_ARU
 - PER_PERIODS_OF_SERVICE_ARU
 - PER_PERIODS_OF_PLACEMENT_ARU
 - PER_PERSON_TYPE_USAGES_F_ARI
 - PER_PERSON_TYPE_USAGES_F_ARD
 - PER_PERSON_TYPE_USAGES_F_ARU
 - PER_ALL_ASSIGNMENTS_F_ARD
 - PER_ALL_ASSIGNMENTS_F_ARI
 - PER_ALL_ASSIGNMENTS_F_ARU
 - PER_ABSENCE_ATTENDANCES_ARD
 - PER_ABSENCE_ATTENDANCES_ARI
 - PER_ABSENCE_ATTENDANCES_ARU

4. For each trigger, click the Business Group tab. Ensure there is an entry for <All Business Groups>.

Running the Diagnostics Setup Reports

You can run diagnostics reports to ensure both your HRMS system, and your data, are set up correctly for DBI for HRMS reporting. The reports also provide information on the impact of your current settings. Typically, you schedule these reports to run regularly to check your system and data setup.

For report descriptions, see: DBI for HRMS Diagnostics Reports, page 1-3

To run the Diagnostics System Setup Report:

1. Use your DBI Administrator responsibility to navigate to the Submit Requests window.
2. Find the HRMSI(DBI) Diagnostics System Setup Report.
3. Schedule the report as necessary.
4. Submit the report.
5. In the Requests window, view the log.

To run the Diagnostics Data Setup Report:

1. Use your DBI Administrator responsibility to navigate to the Submit Requests window.
2. Find the HRMSI(DBI) Diagnostics Data Setup Report.
3. Enter the Start and End dates of the reporting period.
4. Select Count or Detail Mode.
5. If you select Detail Mode, select the Section you want to report on, and optionally select a Sub-section.
6. Schedule the report as necessary.
7. Submit the report.
8. In the Requests window, view the log.

Populating the Time Dimension

Use the Update Time Dimension concurrent program to populate the time dimension. The time dimension supports the trend reports within DBI for HRMS.

The Update Time Dimension concurrent program populates the time dimension with time elements, depending on the calendar type you selected in the Enterprise Calendar global parameter.

Typically you update the time dimension so that data is available one to two years prior to the Global Start Date.

For information on the Enterprise Calendar global parameter, and the Global Start Date, see *Implementing Global Parameters in Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Important: The time dimension is used by all Daily Business Intelligence pages and reports, so check with your functional and technical implementation experts before updating the time dimension.

This concurrent program is currently not in the full or incremental request sets for DBI for HRMS. It will be included in the request sets in future releases. This concurrent program may be included in request sets for other DBI areas.

Use the Submit Requests window.

To populate the Time dimension:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select Update Time Dimension.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
From Date	This earliest date that you want to report on in DBI. This date defaults to the Global Start Date, but can be any date for which there are open periods in the Enterprise Calendar.
To Date	This is the latest date that you want to report on in DBI. This date defaults to the last open period defined in the Enterprise Calendar.

4. Submit your request.

After implementation, run this program in incremental mode from the last collection date to the end of the enterprise calendar.

Populating the DBI for HRMS Base Summary Tables

Run the sets of concurrent programs to load and refresh the data for DBI for HRMS dashboards.

Running the HR Management Initial and Incremental Request Sets

To populate the DBI for HRMS base summary tables with all your data for People Management dashboards, run the initial request set for HR Management. This request set purges the base tables and repopulates them.

To maintain DBI for HRMS after implementation is complete, you must run the incremental request set for HR Management at regular intervals. Typically, you schedule the incremental request set to run periodically to update the base summary tables. If you want the data in the People Management dashboards to be accurate on a daily basis, you need to schedule the incremental request set to run daily. The incremental refresh request set does not purge the underlying tables. It collects data from the last collection date.

To successfully run the incremental request set, you need to activate dynamic triggers. See: *Enabling the Payroll Events Model*, page 3-26

For instructions on creating and running DBI request sets, see: *Post-Setup Steps in Oracle Daily Business Intelligence Implementation Guide*

Running the Workforce Budget Management Initial Request Set

To populate the DBI for HRMS base summary tables with all your data for the Workforce Budget Management dashboard, run the initial request set for Workforce Budget Management. This request set purges the base tables and repopulates them. The request set resets the default values for each concurrent program after the initial load and performs the subsequent full loads. There is no incremental set for the Workforce Budget Management dashboard.

Running the HRI DBI Benefits Initial and Incremental Load Request Set

To populate the DBI for HRMS base summary tables with all your data for the Open Enrollment Management dashboard, run the HRI DBI Benefits Initial and Incremental Load request set with Full Refresh parameters set to Yes. If you want to collect data for previous open enrollments when you run the full refresh, ensure that you set the Collect for Current Open Enrollment profile option to No. To collect data for current open enrollment data, set the profile option value to Yes. This request set purges the base tables and repopulates them in full refresh mode, when the Collect for Open Enrollment profile option value is set to No.

After the initial run, the request set automatically sets the Full Refresh parameters to No. The request set in incremental mode collects data from the last collection date.

Running the Employee Absence Management Initial and Incremental Request Sets

To load the DBI for HRMS base summary tables with all your data for the Employee Absence Management dashboard, run the initial request set for Employee Absence Management.

For ongoing maintenance of DBI for HRMS, you must run the incremental request set for Employee Absence Management at regular intervals. Typically, you schedule the incremental request set to run periodically to update the base summary tables. If you want the data in the Employee Absence Management dashboard to be accurate on a daily basis, you need to schedule the incremental request set to run daily. The incremental refresh request set does not purge the underlying tables. It collects data from the last collection date.

Important: You must run the HR Management request set again immediately after or before running the Employee Absence Management request set as the summary tables are shared between the two and running the Employee Absence Management request set can refresh part of the HR Management summary tables leading to redundant data.

To successfully run the incremental request set, you must set the HRI:Populate Absence Event Queue profile option to Yes and also activate dynamic triggers. See: Enabling the Payroll Events Model, page 3-26

For instructions on creating and running DBI request sets, see: Post-Setup Steps in *Oracle Daily Business Intelligence Implementation Guide*

Rerunning the HR Management and Employee Absence Management Initial request sets

Rerun the Initial request sets if:

- There is a change to the global start date.
- The request sets failed during the first time. Run the sets from the stage they failed or from the start.

- There are large number of changes or if the previous set was run long back.

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-9 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-8 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.

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-3.

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.

Behavioral Indicators

Characteristics that identify how a competence is exhibited in the work context.

See also: *Proficiency Level* , page Glossary-24

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

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 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-7, *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-7

Costable Type

A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing

Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order

A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority.

See also: *Arrestment*, page Glossary-3

Credit

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

Criteria Salary Rate

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

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-10, *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

The temporary or permanent employment of an employee in a business group.

See also: *Secondment*, page Glossary-29

Deployment Factors

See: *Work Choices*, page Glossary-34

Deployment Proposal

The entity an HR Professional defines using the Global Deployments function that controls the permanent transfer or temporary secondment of an employee to a different business group.

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-10

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-30

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.

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 Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

Performance (within Assessment)

An expectation of "normal" performance of a competence over a given period. For example, a person may exceed performance expectation in the communication competence.

See also: *Proficiency (within Assessment)*, page Glossary-24, *Competence*, page Glossary-7, *Assessment*, page Glossary-3

Period of Incapacity for Work (PIW)

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less than the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an 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.

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 (within Assessment)

The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level.

See also: *Performance (within Assessment)*, page Glossary-23, *Competence*, page Glossary-7, *Assessment*, page Glossary-3

Proficiency Level

A system for expressing and measuring how a competence is exhibited in the work context.

See also: *Behavioral Indicators*, page Glossary-5.

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-7

Qualifications Framework

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

Qualifying Days

In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern

See: *SSP Qualifying Pattern*, page Glossary-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.

See also: *Proficiency Level*, page Glossary-24

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-30

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-27, *Security Groups*, page Glossary-27

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.

Secondment

The temporary transfer of an employee to a different business group.

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 Ministère du Revenu du Québec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-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 Ministère du Revenu du Québec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

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.

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.

Transcentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard 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-4

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-8

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.

Work Structures

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

Index

B

buckets

- Length of Work Banding, 3-18
- Performance Banding, 3-20, 3-23
- Period of Placement, 3-19

C

concurrent programs, 3-16

- HRI Load All Benefits Compensation Objects And Enrollment Periods, 3-6
- HRI Load All Benefits Eligibility And Election Events, 3-7
- HRI Load All Benefits Enrollment Actions, 3-7
- HRI Load All Budgets, 3-4
- HRI Load All Headcount Budgets By Organization Manager Hierarchy, 3-5
- HRI Load All Job Hierarchies, 3-16
- HRI Load All Labor Cost Actuals (Payroll Costing), 3-3
- HRI Load All Labor Cost Budgets By Organization Manager Hierarchy, 3-5
- HRI Load All Labor Cost Commitments, 3-4
- HRI Load All Organization Manager Hierarchies, 3-4
- HRI Load Separation Reasons Table, 3-11, 3-13
- HRI Load Summarized Assignment Events by Organization Manager Hierarchy, 3-6
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments, 3-4
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy, 3-5
- Update Time Dimension, 3-28

D

- Daily Business Intelligence for HRMS, 1-1
- Daily HR Intelligence role, 1-2
- DBI for HRMS
 - data security, 1-3
- DBI for HRMS base summary tables
 - request sets, 3-29
- DBI parameters
 - manager, 1-3
- DBI responsibilities

- HR Line Manager, Daily HR Intelligence, Chief HR Officer, Workforce Budget Manager, Benefits Manager, 1-2
- DBI users, 2-5, 2-10
- Diagnostics Data Setup report, 3-28
- Diagnostics System Setup report, 3-28
- dimension
 - setting up area geography dimension, 3-23

E

- Employee Absence Management
 - implementation flowchart, 2-4
- Employee Absence Management Dashboard
 - implement, 2-15, 2-15
- Employee Absence Management Initial request set, 3-3
- Enterprise Calendar, 3-28

F

- flexfields
 - key, descriptive
 - Job, 3-14
- formulas
 - compile, 2-6, 2-12, 2-16
 - HR_MOVE_TYPE_TEMPLATE, 3-11, 3-12
 - HRI_GENERATE_FAST_FORMULA, 3-21
 - HRI_MAP_JOB_JOB_ROLE, 3-17
 - HRI_MAP_WORKER_TYPE, 3-24
 - NORMALIZE_APPRAISAL_RATING, 3-21, 3-23
 - NORMALIZE_REVIEW_RATING, 3-20, 3-23

G

- Global Start Date, 3-28

H

- hierarchies
 - job
 - check database setup, 3-17
 - check hierarchy setup, 3-16, 3-16
 - Job Families, 3-14
 - Job Functions, 3-14
 - set up, 3-14

- structure, 3-15, 3-16
- supervisor, 1-3
- HR Management Incremental request set, 3-15, 3-16
- HR Management Initial and Incremental request set, 3-2
- HR Management Initial request set, 3-15, 3-16
- HR Management, Chief HR Officer, and Contingent Worker Management dashboards enable, 2-4
- HR: BIS Job Hierarchy – Job Grouping Level 1 system profile, 3-16
- HR: BIS Job Hierarchy – Job Grouping Level 2 system profile, 3-16
- HR_MOVE_TYPE_TEMPLATE formula, 3-11, 3-12
- HRI Load All Benefits Compensation Objects And Enrollment Periods concurrent program, 3-6
- HRI Load All Benefits Eligibility And Election Events concurrent program, 3-7
- HRI Load All Benefits Enrollment Actions, 3-7
- HRI Load All Budgets concurrent program, 3-4
- HRI Load All Headcount Budgets By Organization Manager Hierarchy concurrent program, 3-5
- HRI Load All Job Hierarchies concurrent program, 3-16
- HRI Load All Labor Cost Actuals (Payroll Costing) concurrent program, 3-3
- HRI Load All Labor Cost Budgets By Organization Manager Hierarchy concurrent program, 3-5
- HRI Load All Labor Cost Commitments concurrent program, 3-4
- HRI Load All Organization Manager Hierarchies concurrent program, 3-4
- HRI Load Separation Reasons Table concurrent program, 3-11, 3-13
- HRI Load Summarized Assignment Events by Organization Manager Hierarchy concurrent program, 3-6
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy concurrent program, 3-5
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments concurrent program, 3-4
- HRI: Collect Manager Snapshots system profile, 3-9
- HRI: Manager Snapshot Threshold system profile, 3-9
- HRI: Workforce in Period Calculation Method system profile, 3-8
- HRI:Absence Duration Units system profile, 3-10
- HRI:Collect Open Enrollment in Progress system profile, 3-10
- HRI:DBI Chief HR Officer Named User system profile, 3-9

- HRI:DBI Force Foundation HR Processes system profile, 3-8
- HRI:DBI Link To Transaction System system profile, 3-10
- HRI:Enable Benefits Collections and Event Queue system profile, 3-10
- HRI:Enable Captured Events Archive system profile, 3-8
- HRI:Enable Detailed Logging profile option, 3-9
- HRI:Multithreading Chunk Size profile option, 3-10
- HRI:Number of Threads to Launch profile option, 3-10
- HRI:Period of Service / Placement Date Start Source system profile, 3-9
- HRI:Populate Absence Events Queue system profile, 3-10
- HRI:Populate Assignment Events Queue system profile, 3-8
- HRI:Populate Supervisor Hierarchy Events Queue system profile, 3-8
- HRI:Populate Supervisor Status History Events Queue system profile, 3-8
- HRI_GENERATE_FAST_FORMULA formula, 3-21
- HRI_MAP_JOB_JOB_ROLE formula, 3-17
- HRI_MAP_WORKER_TYPE formula, 3-24

I

- implementation flowchart
 - DBI for HRMS, 2-1

L

- Length of Work Banding bucket, 3-18

N

- non-DBI for HRMS customers, 1-4
- NORMALIZE_APPRAISAL_RATING formula, 3-21, 3-23
- NORMALIZE_REVIEW_RATING formula, 3-20, 3-23

O

- Open Enrollment Management
 - implementation flowchart, 2-3
- Open Enrollment Management Dashboard
 - implement, 2-13, 2-13
- Organization manager, 2-11

P

- Payroll Events Model, 3-26
 - activate triggers, 3-27
- People Management Dashboards
 - implementation flowchart, 2-2

- People Management dashboards
 - implement, 2-4
- Performance Banding bucket, 3-20, 3-23
- Period of Placement Banding bucket, 3-19
- Post Install Steps, 2-1
- profile options
 - HRI:Multithreading Chunk Size, 3-10
 - HRI:Number of Threads to Launch, 3-10
- Programs
 - populating DBI base summary tables, 3-2

R

- reports
 - Diagnostics Data Setup, 3-28
 - Diagnostics System Setup, 3-28
- request sets
 - Employee Absence Management Initial, 3-3
 - HR Management Incremental, 3-15, 3-16
 - HR Management Initial, 3-15, 3-16
 - HR Management Initial and Incremental, 3-2
- responsibilities
 - DBI, 1-2
- role
 - Daily HR Intelligence, 1-2
 - Workforce Budget Manager, 1-2

S

- separation categories
 - define, 3-11
- separation reasons
 - categorize, 3-12
 - load, 3-13
- Setting up Area Geography dimension, 3-23
- system profiles
 - HR: BIS Job Hierarchy – Job Grouping Level 1, 3-16
 - HR: BIS Job Hierarchy – Job Grouping Level 2, 3-16
 - HRI: Collect Manager Snapshots, 3-9
 - HRI: Manager Snapshot Threshold , 3-9

- HRI: Populate Absence Events Queue, 3-10
- HRI:Absence Duration Units, 3-10
- HRI:Collect Open Enrollment in Progress, 3-10
- HRI:DBI Chief HR Officer Named User, 3-9
- HRI:DBI Force Foundation HR Processes, 3-8
- HRI:DBI Link To Transaction System, 3-10
- HRI:Enable Benefits Collections and Event Queue, 3-10
- HRI:Enable Captured Events Archive, 3-8
- HRI:Enable Detailed Logging, 3-9
- HRI:Period of Service / Placement Date Start Source, 3-9
- HRI:Populate Assignment Events Queue, 3-8
- HRI:Populate Supervisor Hierarchy Events Queue, 3-8
- HRI:Populate Supervisor Status History Events Queue, 3-8
- HRMS: HRI: Workforce in Period Calculation Method, 3-8
- Workforce Measurement Type, 3-8

T

- time dimensions
 - DBI for HRMS
 - populate, 3-28

U

- Update Time Dimension concurrent program, 3-28

W

- Workforce Budget Management
 - implementation flowchart, 2-3
- Workforce Budget Management Dashboard
 - enable, 2-10
 - implement, 2-10
- Workforce Budget Manager role, 1-2
- Workforce Measurement Type system profile, 3-8

