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Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide, Release 12

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Contents

Send Us Your Comments

Preface

1 Security Rules

Security Overview 1-1
Security Rules 1-2
Security in Oracle HRMS 1-5
Key Concepts 1-5
Security Models 1-6
Security Groups (Security Groups Enabled Model Only) 1-14
Reporting Access 1-17
Security Processes 1-17
Setting Up Standard HRMS Security 1-19
Setting Up Security Groups Enabled Security 1-21
Setting Up Security for Applications Using Some HRMS Windows 1-24
Setting Up Reporting Users 1-26
Defining a Context for Mass Actions 1-27
Security Profiles 1-29
Security Profiles 1-29
Assignment-Level Security 1-34
Security Profiles by Supervisor Hierarchy 1-42
Security Profiles by Organization and Organization Hierarchy 1-44
Security Profiles By Position and Position Hierarchies 1-45
Defining a Security Profile 1-47
Assigning Security Profiles 1-54
Using the Find Security Profile Assignment window 1-55

Running the Security List Maintenance Process..... 1-56
Running the Change Candidate Access for Security Profiles Process..... 1-57
User Profiles..... 1-59
User Profiles..... 1-59
Menus, Functions, and Responsibilities..... 1-125
Responsibilities..... 1-125
Menu Structure..... 1-127
Request Groups..... 1-129
Structuring Menus..... 1-129
Defining Menus..... 1-130
Disabling Multiple Windows..... 1-131
Defining Menu Functions..... 1-132
Restricting Access to Query-Only Mode..... 1-132
Using Parameters for HRMS Form Functions..... 1-132
AuditTrail..... 1-135
AuditTrail Overview..... 1-135
Audit Information Reports..... 1-135
Custom Audit Reports..... 1-138
Setting Up AuditTrail..... 1-140
Disabling AuditTrail..... 1-141
Running the Predefined Audit Report..... 1-142

2 Desktop Integration

Desktop Integration Overview..... 2-1
Desktop Integration..... 2-3
Data Download and Upload Using Web ADI..... 2-5
Data Download and Upload Using Web ADI - Overview..... 2-5
Data Download Using Web ADI..... 2-9
Data Upload Using Web ADI..... 2-10
Letter Generation Using Web ADI..... 2-10
Implementing Web ADI for use with Oracle HRMS..... 2-11
Configuration of Data Download and Upload Using Web ADI..... 2-13
Controlling Access to HRMS Web ADI Integrators..... 2-14
Upgrade Information for Converting from ADE to Web ADI..... 2-18
Downloading Data to your Desktop using Web ADI..... 2-20
Uploading Data using Web ADI..... 2-22
Uploading Data from Legacy Systems using Web ADI..... 2-23
Defining Standalone Integrator Queries..... 2-24
Maintaining Standalone Integrator Queries..... 2-25
Disabling Standalone Integrator Queries..... 2-26

Controlling Integrator Access ... 2-26
Defining Mappings in Web ADI ... 2-28
Creating Mail Merge Letters using Web ADI ... 2-29
Managing Template Letters Using Web ADI ... 2-31
Creating Links between Template Letters and Layouts ... 2-32
Configuring Web ADI ... 2-33
Creating Integrators in Web ADI ... 2-33
Defining Layouts in Web ADI ... 2-35
Converting ADE Styles to Web ADI Integrators ... 2-36
Letter Generation ... 2-38
Letter Generation Overview ... 2-38
Concurrent Processing ... 2-38
Example Files ... 2-41
Planning Standard Letter Requirements ... 2-48
Writing a SQL*Plus Script for MultiMate or WordPerfect ... 2-49
Writing a SQL*Plus Script for Microsoft Word ... 2-50
Registering the SQL*Plus Script ... 2-51
Linking the SQL*Plus Script With a Letter ... 2-51
Writing a Skeleton Letter ... 2-52
Merging the Data File with the Standard Letter ... 2-53
Linking the Report With a Letter ... 2-54
Writing and Registering the Report ... 2-55
Requesting Letters/Running the Report ... 2-55

3 Extending Oracle HRMS

Extend Oracle HRMS Overview ... 3-1
Extend Oracle HRMS ... 3-4
Flexfields ... 3-6
Flexfields ... 3-6
User Definable Key Flexfields ... 3-6
User Definable Descriptive Flexfields ... 3-11
Descriptive Flexfield List ... 3-12
Descriptive Flexfields and Address Styles ... 3-20
Developer Flexfields ... 3-22
Creating Key Flexfield Database Items ... 3-26
Creating Descriptive Flexfield Database Items ... 3-26
Changing Default National Address Styles ... 3-27
Extra Information Types ... 3-30
Extra Information Types (EITs) ... 3-30
EITs and Security ... 3-31

Example Script for Registering Extra Information Types (EITs) 3-32
Setting Up Extra Information Types (Excluding Organization EITs) 3-33
Setting Up Extra Information Types for an Organization Classification 3-36
Setting Up Extra Information Types For a Responsibility 3-38
Entering Extra Information 3-39
Running the Register Extra Information Types (EITs) Process 3-40
User-Defined Tables 3-42
User-Defined Tables 3-42
Predefined User Tables 3-43
Setting Up User Tables, Columns and Rows 3-56
Entering Table Values 3-57
Lookups 3-59
Lookups 3-59
User and Extensible Lookups 3-60
Adding Lookup Types and Values 3-99
Removing Lookup Values 3-101
Document Categories and Types 3-103
Overview of Document Categories and Types 3-103
Creating Document Categories, Subcategories, and Types 3-103
Running the Register Document Types (EITs) Process 3-104
User Types and Statuses 3-106
User Types and Statuses Window 3-106
Creating User Types and Statuses 3-107
Alerts 3-109
Oracle HRMS Predefined Alerts 3-109
Conditions of the HRMS Alerts 3-119
Example of Setting up a HRMS Alert 3-122
Custom Library Events and APIs 3-125
CUSTOM Library Events 3-125
Publicly Callable Business Process APIs in Oracle HRMS 3-127
APIs Available for HR Foundation Users 3-127
Info Online Links to Information Provider Websites 3-129
Info Online Links to Information Provider Websites 3-129
Info Online Content Container 3-132
Info Online Links to Authoria HR 3-132
Example SQL Script to Populate Mapping Table 3-134
Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR 3-136
Configuring Mappings between Oracle and Authoria HR 3-137
Link Windows (Task Flow) 3-139
Task Flow 3-139

Task Flow Windows ... 3-141
Task Flow (Oracle Workflow) ... 3-147
Creating Task Flows Using Forms ... 3-148
Defining Task Flow Nodes ... 3-148
Defining Task Flows ... 3-149
Copying an Existing Task Flow ... 3-151
Adding a New Window to an Existing Task Flow ... 3-151
Amending the Navigation of a Task Flow ... 3-152
Generating a Task Flow From Oracle Workflow ... 3-152
Creating Task Flows Using Workflow ... 3-152
Creating a Top Level Process ... 3-153
Creating Sub Processes ... 3-154
Creating Button Labels ... 3-155
Positioning Button Display ... 3-156
Identifying Windows or Blocks to Display ... 3-157
Identifying Configured Forms to Include in the Task Flow ... 3-157
Verifying and Saving the Workflow ... 3-157
Transferring Task Flows Between Databases ... 3-158
Configure Windows Using the People Management Configurator ... 3-160
People Management Configurator ... 3-160
People Management Templates ... 3-162
Predefined People Management Templates ... 3-166
Find Window Configuration ... 3-168
SITs, EITs and Other Flexfields in Templates ... 3-170
Context-Sensitive Fields In Templates ... 3-172
Online Help Targets for Templates ... 3-173
Notification Messages Issued From Template Window ... 3-173
People Management Configurator Options ... 3-176
Fields on the People Management Window ... 3-184
Using the People Management Configurator ... 3-222
Opening and Copying a Template ... 3-223
Editing a Template ... 3-224
Adding and Removing Fields on a Template ... 3-226
Adding Flexfields to a Template ... 3-227
Defining Checklists ... 3-228
Setting Defaults for Fields in Templates ... 3-230
Setting Up Context-Sensitive Fields In Templates ... 3-231
Setting Up DateTrack History on Fields in Templates ... 3-232
Setting Up More Information on Fields in Templates ... 3-232
Adding a People Management Template Window to a Menu or Task Flow ... 3-233
Importing a Template ... 3-234

Restrict Windows Using CustomForm ... 3-235
CustomForm ... 3-235
Using CustomForm ... 3-241
Configuring a Window With CustomForm ... 3-241
Adding a Custom Window to a Menu or Task Flow ... 3-242
Additional Configuration Options ... 3-244
Additional Configuration Options ... 3-244
Setting Up Your Printers ... 3-244
What is International HRMS? ... 3-245
What is Included in International HRMS ... 3-246
Overview: Using International HRMS to Define a Localization ... 3-247
Enabling Currencies ... 3-248
Running the International HRMS Setup Process ... 3-248
Using the Person Name Format Function ... 3-249

4 Workforce Intelligence

Information Access Overview ... 4-1
Information Access ... 4-5
Administering Workforce Intelligence ... 4-8
Discoverer Workbooks and End User Layer ... 4-8
Discoverer End User Layer Business Area Descriptions ... 4-8
Programs to Populate Workforce Intelligence Discoverer Reports ... 4-12
Workforce Calculation ... 4-19
Configuring Workforce Calculations Using Oracle FastFormula ... 4-21
Entering A Conversion Rate Type ... 4-22
Amending the Default Training Hours ... 4-23
Adding Additional Training Time Periods ... 4-24
Granting Business Area Access ... 4-25
Check the Vacancy Status Options ... 4-26
Populating the Organization Hierarchy Summary Table ... 4-26
Populating the Supervisor Hierarchy History Table ... 4-27
Populating the Workforce Measurement Value History Table ... 4-27
Populating the Generic Hierarchy Summary Table ... 4-28
Collecting Organization Hierarchy Structures ... 4-29
Adding BIS Load Organization Hierarchy Summary Table to a Request Group ... 4-30
Populating the Organization Hierarchy Tables ... 4-30
Using Attachments ... 4-31
Using Inquiry Windows and Folders ... 4-33
Running Predefined and User Defined Reports ... 4-35
Defining QuickPaint Reports ... 4-36

Running QuickPaint Reports..... 4-38
Defining Concurrent Process Custom Reports..... 4-38

5 Interface Configuration

Interface Configuration Overview..... 5-1
Interface Configuration..... 5-2
System Extract 5-3
System Extract..... 5-3
XML-Enabled System Extracts..... 5-7
Defining an Extract Criteria Profile..... 5-8
Defining an Extract Layout..... 5-11
Defining a System Extract..... 5-17
Viewing Extract Change Events for a Person..... 5-19
Viewing Extract Results..... 5-20
Running the System Extract Concurrent Processes..... 5-21
Restarting an Extract Process..... 5-22
Purging System Extract Results..... 5-22
Purging the System Extract Change Log..... 5-23
Running the Extract XML Publisher Process..... 5-24
Migrating a System Extract..... 5-25
Batch Element Entry..... 5-27
BEE (Batch Element Entry)..... 5-27
Making Batch Element Entries Using BEE..... 5-29
Entering a Batch Header..... 5-30
Setting Up BEE Validation Using Control Totals..... 5-33
Creating the Same Line for Several Assignments..... 5-33
Creating or Editing Individual Batch Lines..... 5-34
Creating Several Lines for One Assignment..... 5-36
Validating a BEE Batch..... 5-38
Transferring a BEE Batch..... 5-38
Purging a Batch From the BEE Tables..... 5-39
Reviewing BEE Process Results..... 5-39
Processing Multiple BEE Batches Together..... 5-40
Rolling Back a BEE Process..... 5-41
Spreadsheet Loaders..... 5-42
Spreadsheet Loaders: Frequently Asked Questions..... 5-42

Index

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Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide, Release 12

Part No. B31614-05

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide.*

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

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

  If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University
- Oracle Self-Service Web Applications.
- The Oracle Applications graphical user interface.

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

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

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Structure

1 Security Rules
2 Desktop Integration
3 Extending Oracle HRMS
4 Workforce Intelligence
5 Interface Configuration

Related Information Sources

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query data, 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 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 Daily Business Intelligence for HRMS Implementation Guide

This guide provides basic setup procedures for implementing and maintaining HRMS-related dashboards.

Oracle 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 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.

Oracle Application Framework Personalization Guide

Learn about the capabilities of the OA 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 Guide

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine

the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

This guide lists the default navigation paths for all windows and the default reports and processes as they are supplied in Oracle HRMS.

Oracle iRecruitment Implementation and User Guide

Set up and use Oracle *i*Recruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

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 12. 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.

Oracle Applications Installation Guide: Using Rapid Install

This guide provides instructions for managing the installation of Oracle Applications products. Oracle Rapid Install 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.

Oracle Applications Upgrade Guide: Release 11i to Release 12

Refer to this guide if you are upgrading your Oracle Applications Release 11*i* products to Release 12. This guide describes the upgrade process and lists database and product-specific upgrade tasks.

Oracle Applications Maintenance Procedures and Oracle Applications Maintenance Utilities

Use these guides to help you run the various AD utilities (such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, and License Manager) and

maintain the Oracle applications file system and database.

Oracle Applications System Administrator's Guides

These guides (Configuration, Maintenance, and Security) provide planning and reference information for the Oracle Applications System Administrator. They describe 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 Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle HRMS implementation team, as well as for users responsible for the ongoing

maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

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

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

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.

1

Security Rules

Security Overview

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

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

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

See: Responsibilities, page 1-125

Security and Business Groups

In general, a user can only view the records for one business group at a time. However, depending on the value of the HR:Cross Business Group Profile option, you can view specific information across business groups. See: User Profiles, page 1-59

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

Within a business group you can control:

- *Who* the user can access, using security profiles. You can restrict access by:

- organization hierarchy
- position hierarchy
- supervisor hierarchy
- payroll
- supervisor assignment

You can also restrict access to specific person types, for example, employees, applicants, contingent workers, and, if you are using iRecruitment, candidates.

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

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

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

See: Menus, page 1-127

See: Defining Menu Functions, page 1-132

Key Concepts

For more detailed information on security concepts, see:

- Security Models, page 1-6
- Security Profiles, page 1-29
- Responsibilities, page 1-125
- Security Processes, page 1-17

Security Rules

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

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

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

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

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

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

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

- Limit access to list of values for faster data entry
- Limit access to certain types of information

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

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

Oracle HRMS is installed with two security models, each enabling you to set up security for an enterprise which uses multiple business groups. Using either model you can only view records for one business group at any one time, *except* in cases where the HR:Cross Business Group user profile allows access to specific fields across all business groups.
See: User Profiles, page 1-59.

The difference between the models is as follows:

- Using Standard HRMS Security you can only link one business group to one responsibility. You must set up different responsibilities for each business group.

- Using Security Groups Enabled Security you can set up more than one business group for a single responsibility. However, you still only view records for one business group at a time.

What does AuditTrail provide?

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

Can you link windows together?

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

Security in Oracle HRMS

Key Concepts

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

Menu Structures

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

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

Reporting Access

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

Request Groups

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

Responsibility

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

Security Groups

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

Security Models

The two security models, Standard HRMS Security (Security Groups Disabled) and

Security Groups Enabled security (formerly called Cross Business Group Responsibility Security), both control security by restricting who and what the user can see. What differs is how you set up security, menus and how users log in. For more detailed information about each of the security models, see Security Models, page 1-6.

Security Processes

System security processes enable you to:

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

Security Profiles

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

User Profiles

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

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

Security Models

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

> **Note:** If you want to set up security for employees who can access the database, but do not change database information, see: Reporting Access, page 1-17 and Setting Up Reporting Users, page 1-26.
>
> A further option exists which enables users to simultaneously view selected fields from all business groups in your organization regardless of the security model. For more information see HR: Cross Business

Group Profile option, page 1-59.

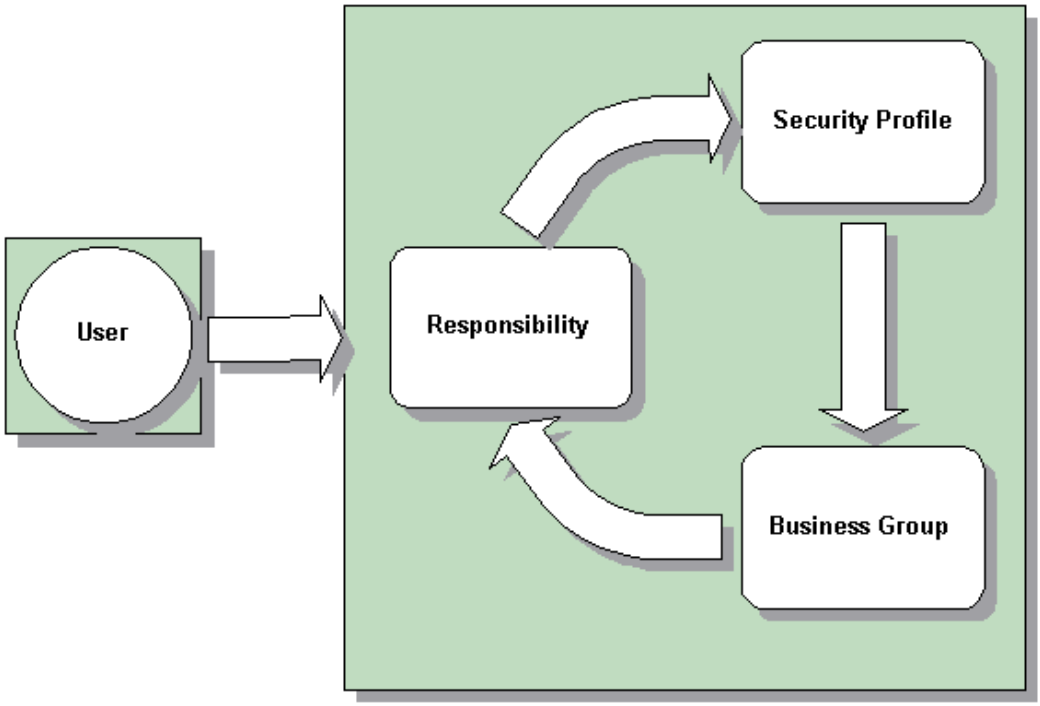
Standard Security Model

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

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

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

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



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

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

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

For more information, see Setting up Standard Security, page 1-19.

Access to Multiple Business Groups using Standard Security

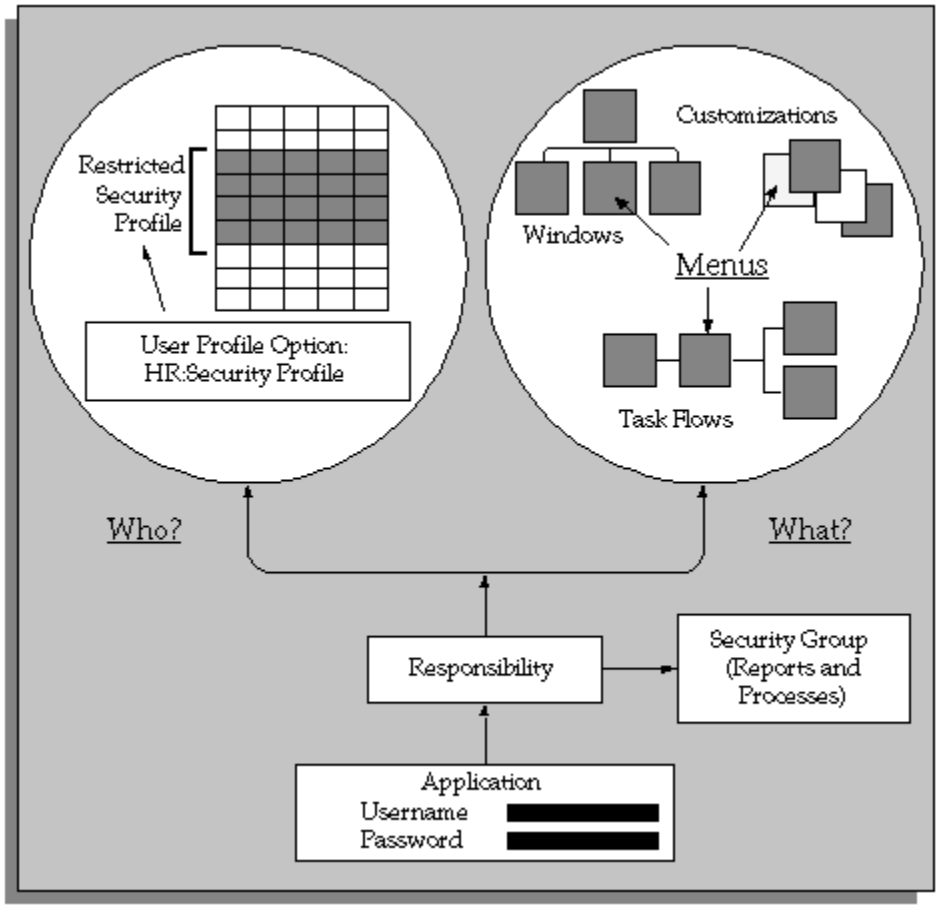
In Standard HRMS Security, you can grant users access to more than one business group within your enterprise. To do this, you must create security profiles and responsibilities and assign them to each additional business group. If a user's responsibility is assigned to more than one business group, they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

Note: The HR: Cross Business Group Profile option enables users to view some limited information across all business groups within an enterprise. For more information, see HR: Cross Business Group Profile option, page 1-59.

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

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

The Completed Standard HRMS Security Model



Security Groups Enabled Model

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

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

Access to Multiple Security Groups using Security Groups Enabled Model

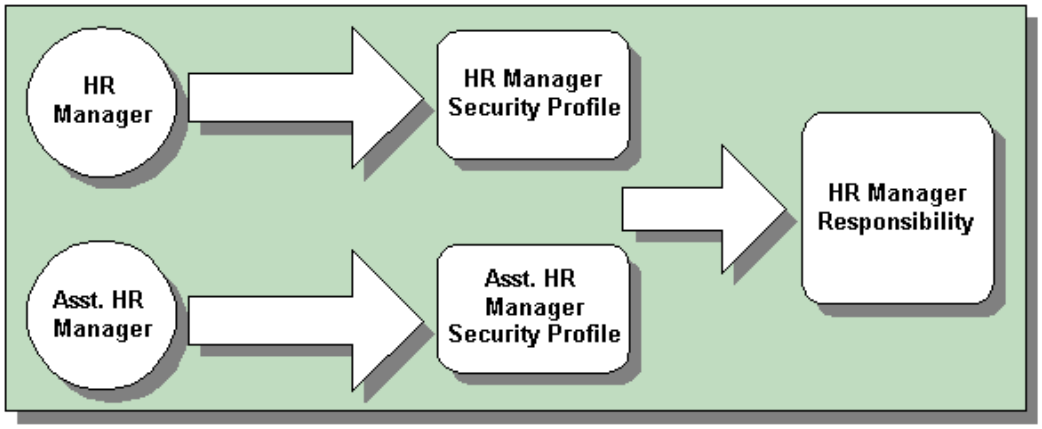
The Security Groups Enabled security model enables you to assign a single responsibility to more than one business group, and hence enable users to access records from numerous business groups, although users cannot view information from different business groups simultaneously.

To set up Security Groups Enabled security, you set the Enable Security Groups Profile option to Yes, and run the Enable Multiple Security Groups process. These steps in combination create a Security Group which has the same name as the business group from which it was created. For more information, see Security Groups, page 1-14.

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

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

Assigning Multiple Security Profiles to a Responsibility



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

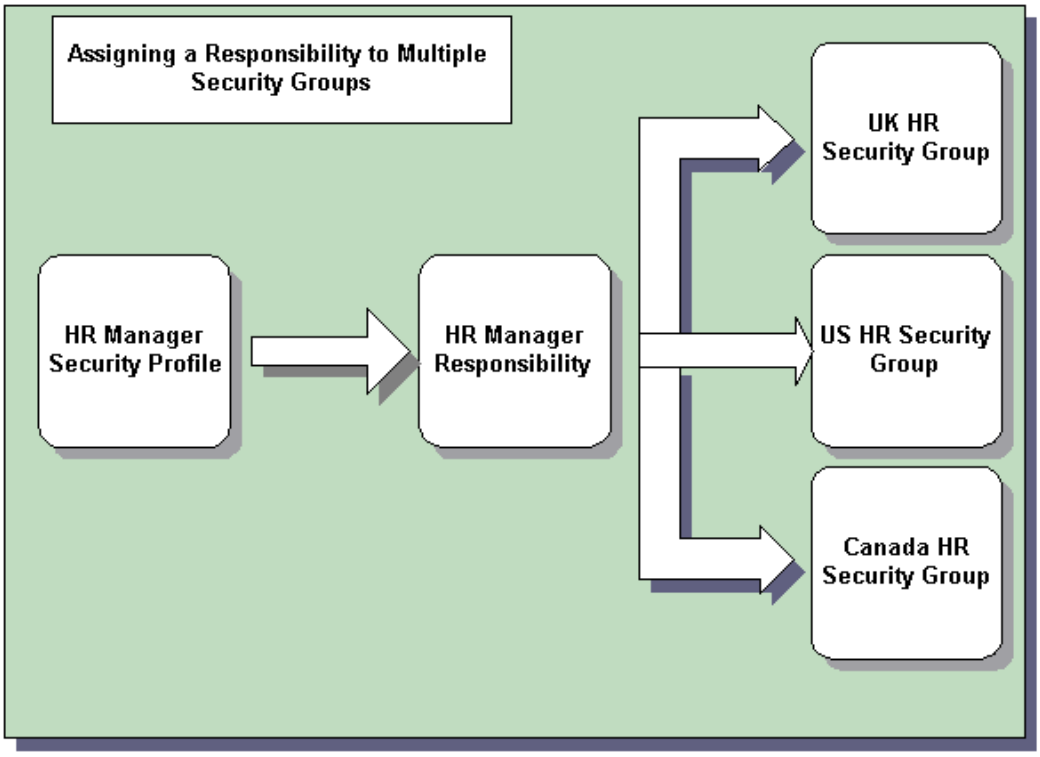
The functionality of responsibilities is also enhanced in the Security Groups Enabled security model. Increasingly, users require access to the records in more than one business group. To accomplish this, you can assign a responsibility to multiple business groups when you use Security Groups Enabled.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

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

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

Note: The HR: Cross Business Group Profile Option enables users to view some information across all business groups within an enterprise. For more information, see HR: Cross Business Group Profile option, page 1-59.

Assigning a Responsibility to Multiple Security Groups

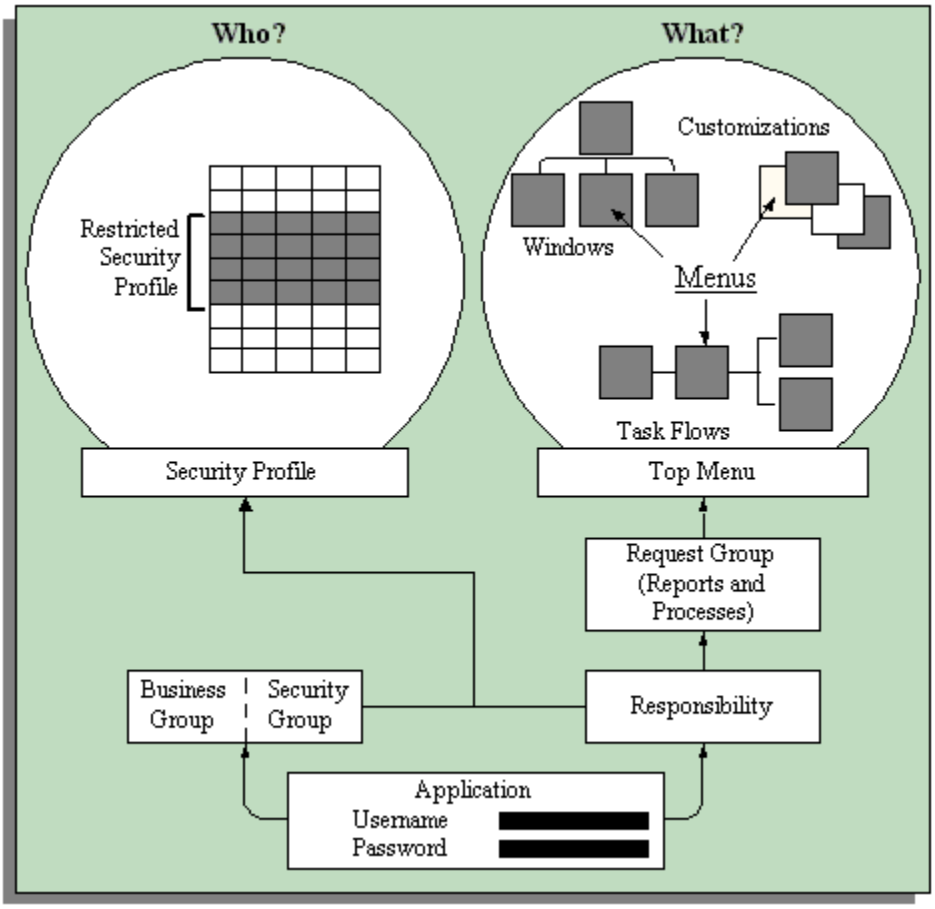


As with Standard HRMS Security, you can set up a request group to restrict user access to reports and processes. The request group is associated with a responsibility which defines the data a user can view. It is also possible to set up reporting only request groups for users who access the database,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

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

For more information see Setting Up Security Groups Enabled Security, page 1-21.

The Completed Security Groups Enabled Model



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

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

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

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

Security Groups (Security Groups Enabled Model Only)

When you use the Security Groups Enabled security model (formerly called Cross Business Group Responsibility security), a security group is automatically created for each business group when you run the Enable Multiple Security Group Process. Because security groups are tied to business groups by set up, partitioning data using this method is the same as partitioning data by business group. See: Setting Up Security Groups Enabled security, page 1-21.

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

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

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

> **Important:** You can change from Standard HRMS security to Security Groups Enabled security, however, you *cannot* switch from Security Groups Enabled security back to Standard HRMS security. See: Updating the Security Model, page 1-21.

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

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

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

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

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

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

> **Important:** Security groups are automatically created for you when you use Oracle HRMS. Do not use the System Administrator's Security Groups window to add security groups as these will not be linked to your business groups.

End-Dating Unwanted Responsibilities

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

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

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

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

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

Example

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

- UK Headquarters (business group)

- Scotland Operations (Security Profile)

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

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

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

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

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

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

Categorizing Information By Security Groups

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

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

- Lookups

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

  See: Adding Lookup Types and Values, page 3-99.

- Concurrent Programs

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

  > **Note:** You do not have to enter a security group against all the concurrent programs. Concurrent programs which are not linked to a

security group display for all security groups/business groups.

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

Reporting Access

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

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

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

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

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

For information about how to set up database access without on-line access, see: Setting Up Reporting Users, page 1-26.

Security Processes

There are four system security processes:

- Enable Multiple Security Groups

  Run this process when you first set up Security Groups Enabled security.

- Generate Secure User

  Run this process when you create a new security profile that references a reporting user.

- Security List Maintenance

Run this process every night.

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

- Grant Permissions to Roles

  This process is run automatically as part of the autoinstall process.

Enable Multiple Security Groups Process (HRSECGRP)

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

- You set up Security Groups Enabled security for the first time to enable HRMS to use multiple security group features.

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

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

Generate Secure User Process (SECGEN)

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

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

Security List Maintenance Process (PERSLM)

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

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

See also Running the Security List Maintenance Process, page 1-56

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

Grant Permissions To Roles Process (ROLEGEN)

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

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

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

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

Setting Up Standard HRMS Security

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

To set up users for Standard HRMS security:

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

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

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

2. Define a Security Profile, page 1-47

   Note: For each restricted security profile you create that references a reporting user, you must run the Generate Secure User (SECGEN)

process. This is a one-off process that is not required for view-all security profiles.

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

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

   See: Defining Menus, page 1-130

   See: Set Up Menus, page 1-132

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

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

   Use the Request Groups window.

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

5. Define a responsibility using the Responsibility window.

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

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

   - HR: User Type

     Use this profile option to limit field access on windows shared between Oracle Human Resources and Oracle Payroll.

   - HR:Security Profile

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

   - HR:Cross Business Group Profile

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

     You can set also set up other User Profile Options.

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

7. Create the username and password using the User window.

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

> **Important:** Do not use the HRMS Assign Security Profile window if you are setting up Standard HRMS security.
>
> See: Users Window, *Oracle Applications System Administrator's Guide*

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

   - Security List Maintenance

     Ensure this process is run every night.

   See: Running the Security List Maintenance Process, page 1-56

Setting Up Security Groups Enabled Security

Use the following setup steps if your enterprise wants to enable many business groups for one responsibility.

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

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

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

To set up users for Security Groups Enabled Security:

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

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

   > **Note:** If this option is set to No then you are not using Security Groups Enabled security.
   >
   > See: System Profile Values, *Oracle Applications System Administrator's Guide*.

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

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

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

> **Warning:** The creation of security groups is more complex with Oracle HRMS 11.5.10 and later releases. For this reason, the Enable Multiple Security Group process may appear slow, particularly if you have a large number of business groups.

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

3. Define a Security Profile, page 1-47.

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

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

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

   See: Set Up Menus, page 1-132.

   See: Defining Menus, page 1-130.

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

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

   Use the Request Group window.

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

6. Define a responsibility using the Responsibility window.

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

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

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

HR:Cross Business Group Profile option, page 1-59 for more information.

> **Note:** For Security Groups Enabled security do*not*set up or amend the HR:Security Profile profile option or the HR: Business Group profile option using the System Profile Values window. To set up or change this profile option use the Assign Security Profile window.
>
> You can set also set up other User Profile Options.

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

8. Create usernames and passwords using the User window.

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

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

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

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

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

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

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

Use the Users window.

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

10. Assign Security Profiles, page 1-54.

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

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

    - Security List Maintenance

      Ensure this process is run every night.

      See: Running the Security List Maintenance Process, page 1-56

Setting Up Security for Applications Using Some HRMS Windows

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

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

Using the following procedure you can either set up a responsibility that can view all records in the Business Group, or restrict access to the records for selected organizations or positions. You can also set up organization security for Financials and Manufacturing business views, page 1-24.

Organization Security for Financials and Manufacturing Business Views

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

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

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

The show_bis_record function secures data according to the definition of the security

profile that is referenced by the MO:Security Profile profile option. If this profile option is not set, the HR:Security Profile profile option is used. This function is called by financials and manufacturing business views.

Single Operating Unit Security

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

Single Operating Unit Plus Inventory Organizations

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

Impact on Security Implementations

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

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

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

To set up security

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

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

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

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

   See: Defining a Security Profile, page 1-47

2. Define a responsibility using the Responsibility window.

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

3. Select a security profile for the new responsibility.

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

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

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

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

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

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

Setting Up Reporting Users

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

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

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

To set up a new reporting user:

1. Create a new reporting user ORACLE ID.

2. Register the new ORACLE ID with Application Object Library using the Oracle Users window, selecting Restricted in the Privilege field.

3. Define a security profile for the new ORACLE ID.

   See: Defining a Security Profile, page 1-47

4. Run the HR security processes using the Generate Secure User Process.

   See: Running Reports and Programs, *Oracle Applications Users Guide*

Defining a Context for Mass Actions

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

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

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

You define a new context in the Contexts window.

To define a Context:

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

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

11. Save your work.

Security Profiles

Security Profiles

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

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

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

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

See also Defining a Security Profile, page 1-47

Restricting Access to Records

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

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

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

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

The criteria you can use to identify records are:

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

> **Tip:** Oracle recommends that you use either a supervisor or position hierarchy for Self-Service Human Resources (SSHR).
>
> For more information on hierarchies in SSHR, see: People in Hierarchy, My List, and Search Pages, *Oracle SSHR Deploy Self-Service Capability Guide*.

InternalOrganizations and Organization Hierarchies

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

Positions and Position Hierarchies

Positions are jobs performed within specified organizations. The position is derived from an organization and a job, for example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.You can define security restrictions based on a position hierarchy.

Payrolls

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

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

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

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

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

Supervisors and Supervisor Hierarchies

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

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

Person-based supervisor hierarchy

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

Assignment-based supervisor hierarchy

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

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

For more information, see Static Lists, page 1-33.

Alternatively, for the highest levels of management, consider setting up

security using organization hierarchies.

Custom Restrictions

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

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

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

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

Assignment-Level Security

Assignment-level security enables you to restrict security access based on individual assignments. This means that the security processes evaluate permissions on an individual assignment basis, rather than displaying all assignments if a manager has access to one assignment.

For more information, see: Assignment-Level Security, page 1-34.

User-Based Security

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

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

For more information on user-based security, see the individual sections in Defining a Security Profile, page 1-47.

Static Lists

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

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

A static list can contain any number of users. You can run the Security List Maintenance process for all users in the static list or use the Process in Next Run option on the Static Lists tab of the Security Profile window to select a specific user or group of users. You use this option in conjunction with the Security List Maintenance parameters; you can run the process for either all users in the static list or only users you select using the Process in Next Run option. By selecting specific users for inclusion in the run, you reduce the time and resources required to run the Security List Maintenance process.

See: Running the Security List Maintenance Process, page 1-56

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

- If slow system performance is unacceptable at sign-on, you can reduce the processing requirement at sign-on by using static lists. Static lists can be particularly useful in the case of a top manager who has a large number of subordinate employees or organizations, for example. In this case, the process to evaluate security permissions may be lengthy at sign-on.

- Static lists require additional maintenance to run the process. In addition, the static lists stores details of every person that the user included in the static list can access so if you include several users in a static list, you may experience an increase in data for processing and may need to consider running the process for selected users only.

- The other factors above become more significant as the size of an organization increases. Large numbers of users logging on to Oracle HRMS at the same time would result in a huge processing requirement at the point of sign-on. In this case, it may be advisable to add users most affected by sign-on issues to the static lists.

Global Security Profiles

You can create global security profiles that enable users to work on organizations in multiple business groups.

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

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

If you use the Oracle HRMS Forms Interface, you cannot access data across business groups using one responsibility, even if you associate a global security profile to your responsibility. Your access is limited to organizations in the business group defined in the HR:Business Group profile option. However, you can use people management templates to query and update worker information across business groups.

Related Topics

Security Processes, page 1-17

Running the Security List Maintenance Process, page 1-56

Assignment-Level Security

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

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

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

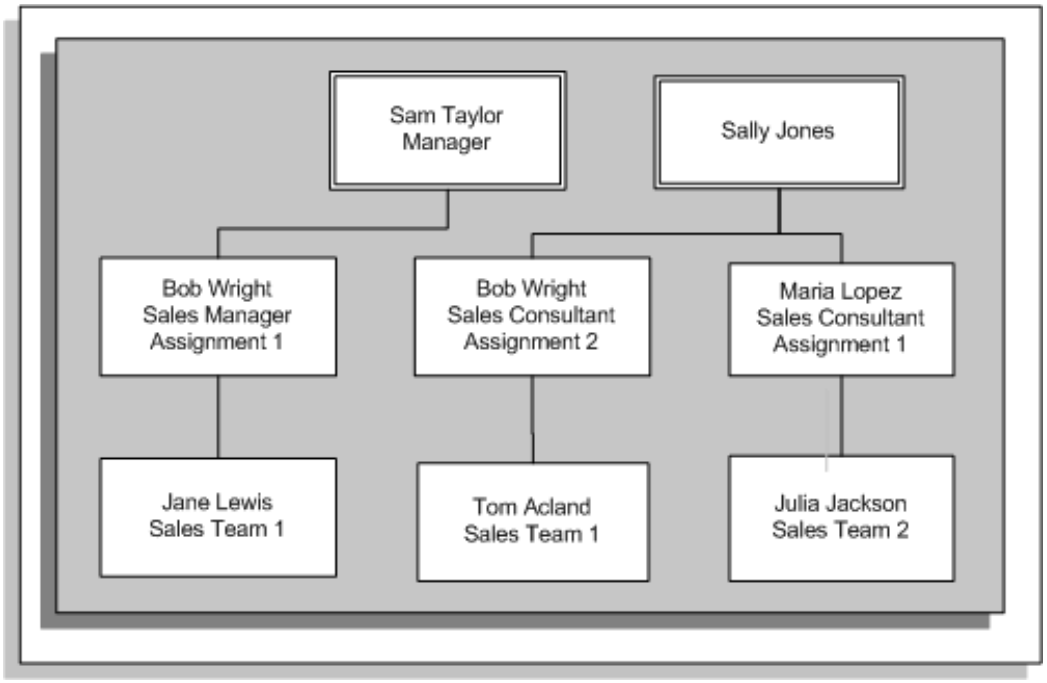
> **Note:** If you use assignment-level security, or any user-based security profile, you cannot display terminated or expired assignments. This is because the process to evaluate access to person record uses existing

assignments based on the effective date.

Supervisor Hierarchies and Assignment-Level Security

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

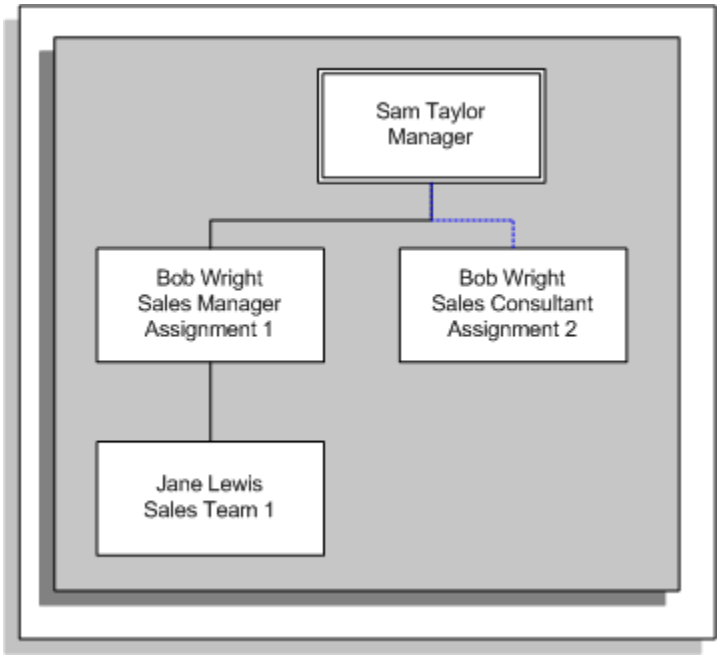
Supervisor Hierarchy



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

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

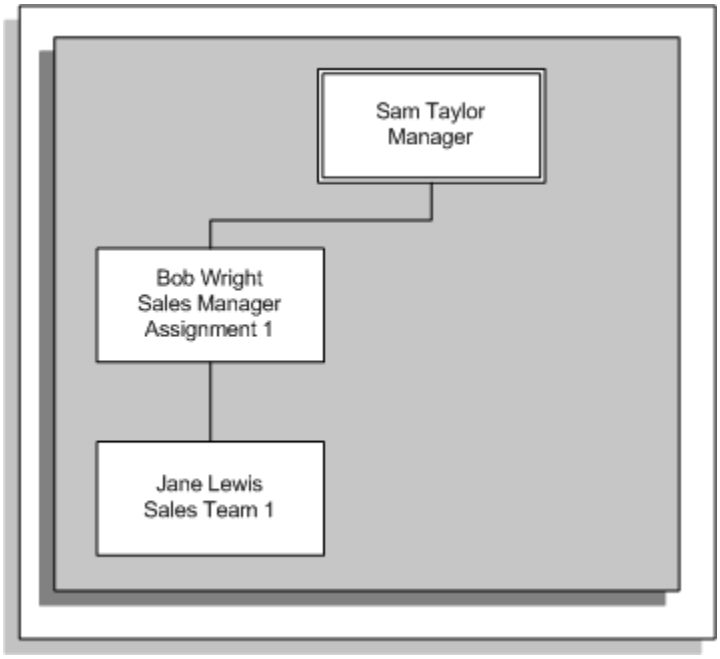
Assignment-Based Hierarchy for Sam Taylor (No Assignment-Level Security)



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

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

Assignment-Based Hierarchy with Assignment-Level Security

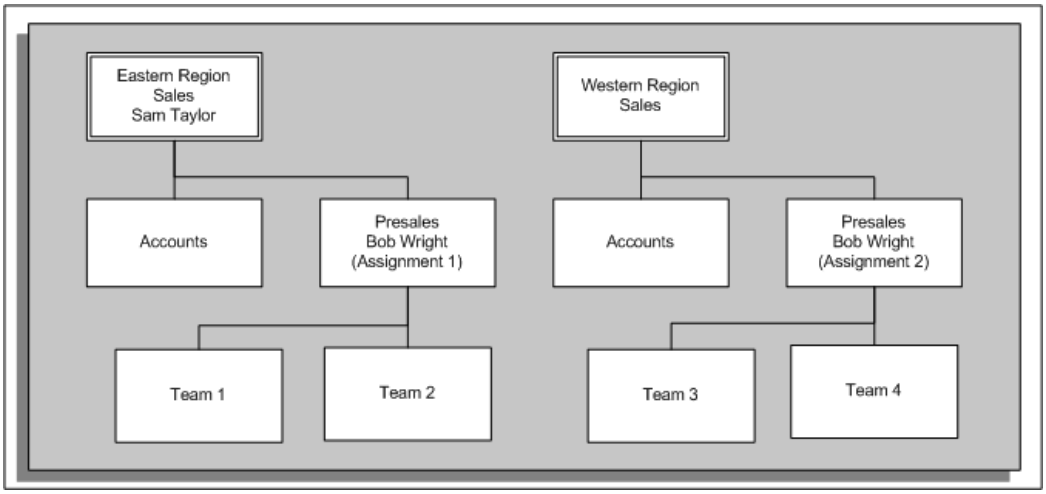


Note: If you are using an assignment-based hierarchy, it is advisable to use assignment-level security.

Organization Hierarchies and Assignment-Level Security

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

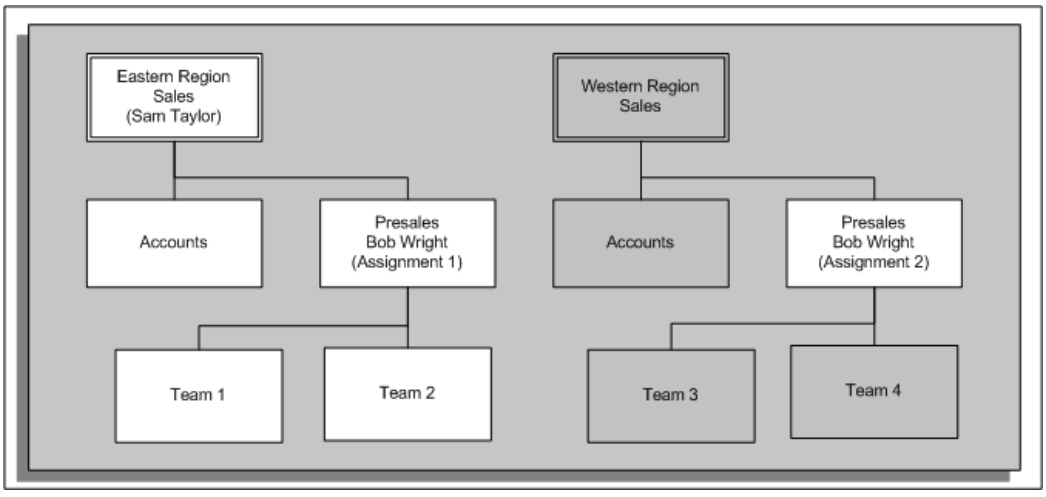
Organization Hierarchy



Organization Hierarchy (No Assignment-Level Security)

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

Organization Hierarchy (No Assignment-Level Security)

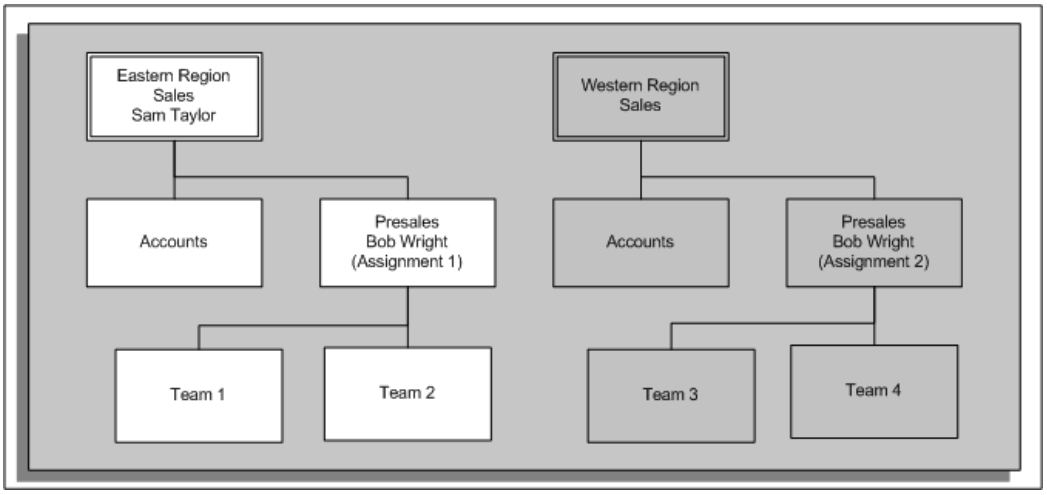


Organization Hierarchy (With Assignment-Level Security)

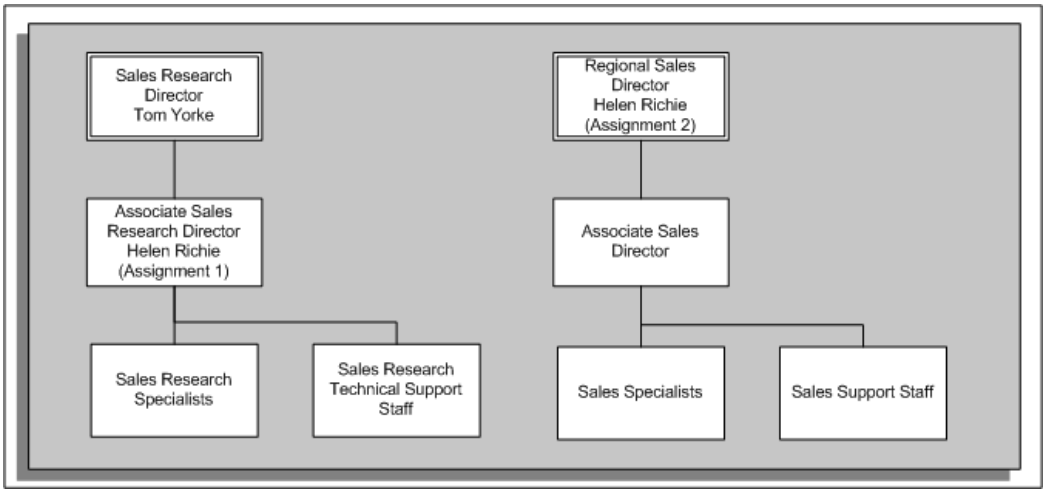
In this situation, Sam can see all people within the Accounts and Presales organizations.

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

Organization Hierarchy (With Assignment-Level Security)



Position Hierarchies



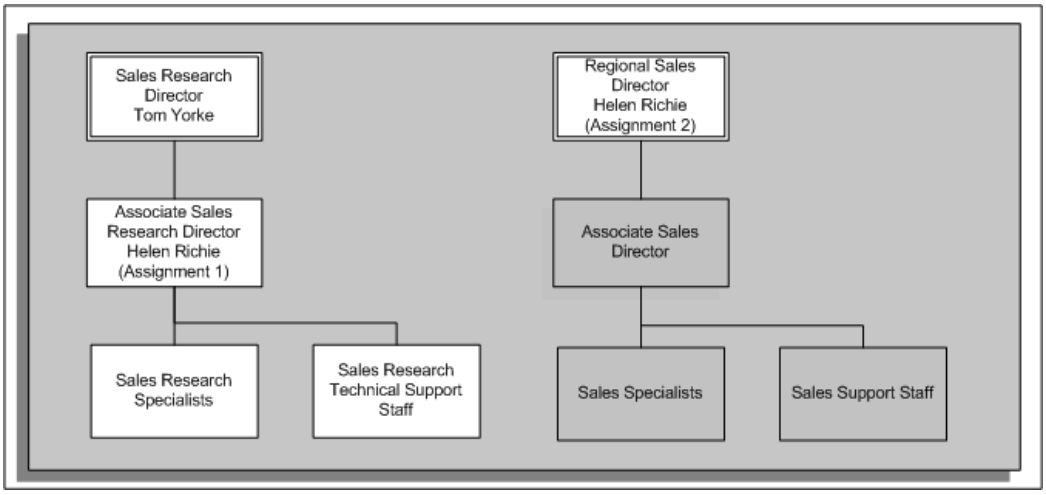
The graphic above shows two position hierarchies. Within the first hierarchy (Sales Research Director) there is an employee with multiple assignments. The following examples show how the hierarchy changes with assignment-level security disabled and enabled.

Position Hierarchy (No Assignment-Level Security)

In this situation, Tom can see the position below him in the hierarchy (Associate Sales Research Director). He can also see the reporting positions (Sales Research Specialists

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

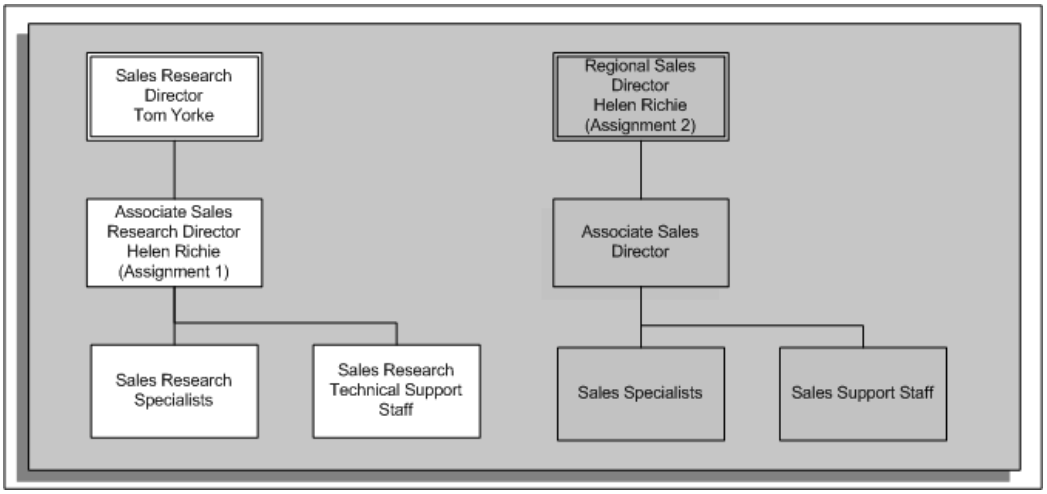
Position Hierarchy (No Assignment-Level Security)



Position Hierarchy (With Assignment-Level Security)

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

Position Hierarchy (With Assignment-Level Security)



Implementing Assignment-Level Security

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

For more information, see: Defining a Security Profile, page 1-47

Assignment-level security is available for several areas of Oracle HRMS. The areas that currently support assignment-level security are:

- Self-Service Human Resources (SSHR)
- The following Oracle HRMS forms:
  - Combined Person and Assignment (PERWSHRG)
  - Enter Assignment (PERWSEMA)
  - People Management (PERWSQHM)
  - Define Assignment Extra Info (PERWSAEI)
  - View Benefits (PERWSVBI)
  - View Salary History (PERWSSLH)
  - Salary Review (PERWSEPY)
  - View Worker Assignment History (PERWSASH)

    - Assignments Folder (PERWSFAS)

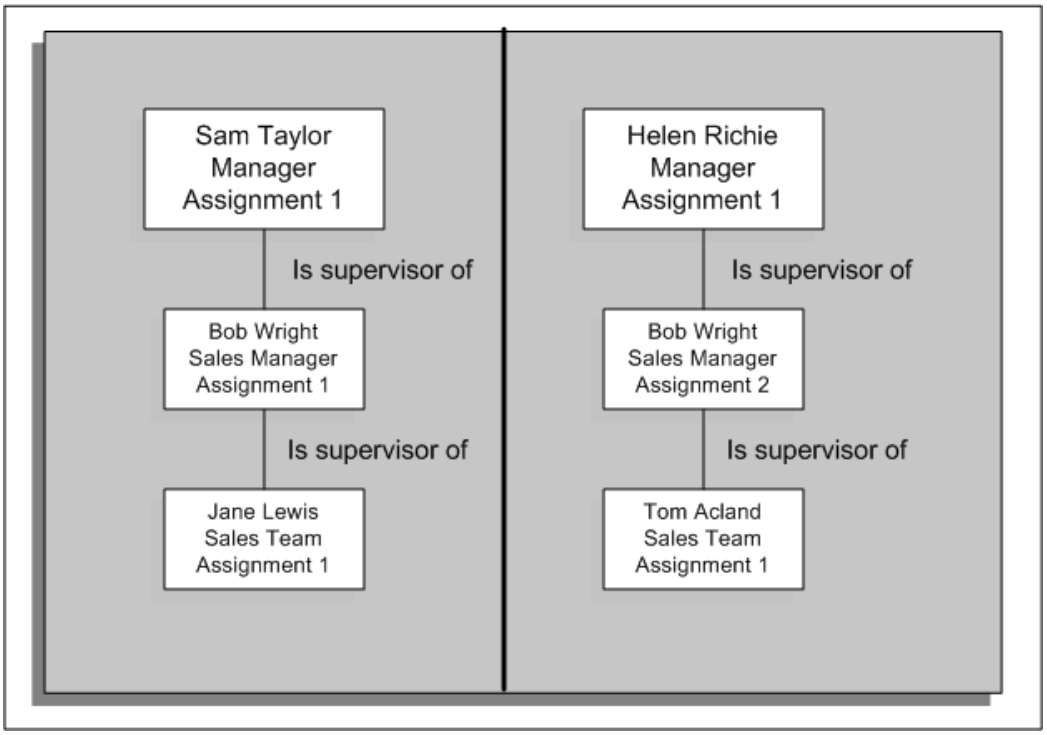
- The following Oracle Payroll forms:
    - View Employee Run Result History (PAYWIELH)
    - Payroll and Assignment Processes (PAYWSACT)
    - Run QuickPay (PAYWSRQP)
    - Batch Element Entry (PAYWSQEE)
    - View Element Entry History for Employee (PAYWIEEH)
    - List Employees by Element (PAYWSLEE)
    - Element Entry (PAYWSMEE)
    - Adjust Balances (PAYWSABL)
    - Pay Method (PAYWSEPM)
    - Irish P45 Form (PAYIEP45)
    - Irish SOE Form (PAYIESOE)
    - Reverse Payroll Run (PAYWSRPR)
    - Irish Tax Information (PAYIETAX)

Security Profiles by Supervisor Hierarchy

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

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

Supervisor Hierarchies



Person-Based Supervisor Hierarchy

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

Assignment-Based Supervisor Hierarchy

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

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

In the example, Sam Taylor's access to person records depends on whether

assignment-level security is enabled. If it is enabled, Sam can only access the records for Bob Wright's first assignment and direct report. If assignment-level security is not enabled, Sam can access the records for both of Bob's assignments and also for the direct report for the first assignment.

For more information, see Assignment-Level Security in Security Profiles, page 1-29.

HR: Supervisor Hierarchy Usage Profile Option

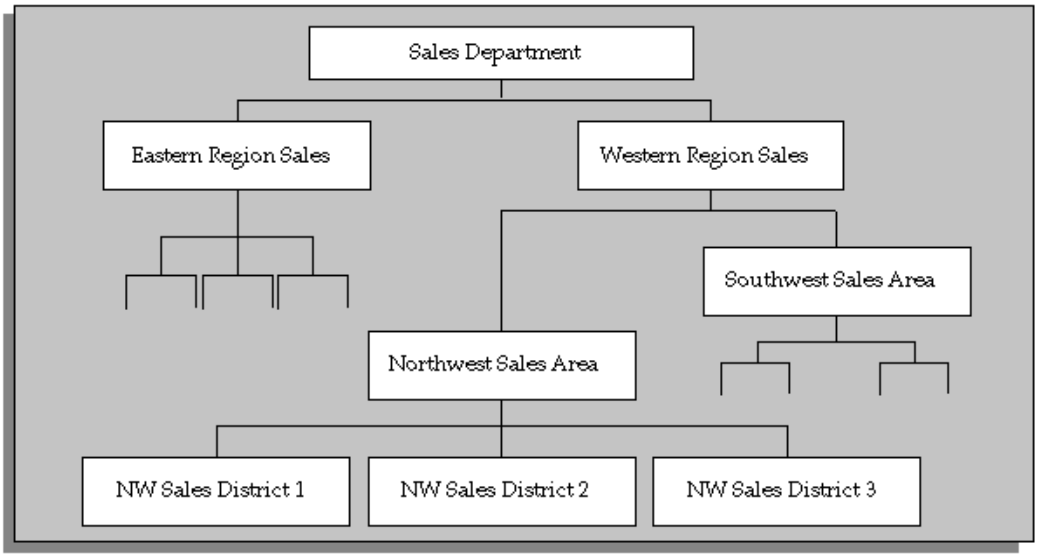
You use this profile option to specify the behavior of the supervisor hierarchy in HRMS applications by specifying whether the supervisor hierarchy is assignment or person-based.

Security Profiles by Organization and Organization Hierarchy

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

For example, suppose you build this Sales Organization hierarchy:

Sales Organization Hierarchy



Without User-Based Security

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

Next, you want the directors of the two sales regions to have access to all employee

records in their region only. You create Eastern and Western Sales Director security profiles. These profiles also reference the Sales hierarchy. But, they name the Eastern and Western Regions, respectively, as the top organizations for these profiles' access to employee records.

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

With User-Based Security

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

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

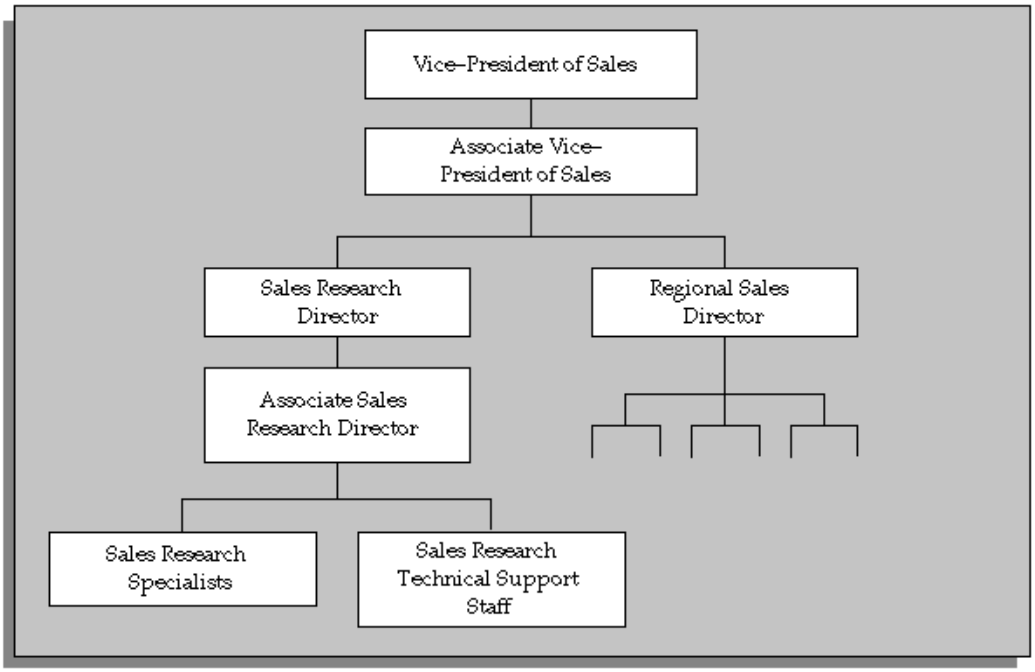
Security Profiles By Position and Position Hierarchies

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

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

You can start by building the following Sales Positions Hierarchy:

Sales Positions Hierarchy



Without User-Based Security

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

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

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

- VP or Associate VP of Sales

- Regional Sales Director
- Regional Sales Director's subordinates

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

With User-Based Security

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

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

Defining a Security Profile

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

See also: Security Profiles, page 1-29

> **Note:** Using the Global Security Profile window *does not* give Oracle HRMS users access to records from multiple business groups within the same responsibility; users must still switch responsibilities to see records from different business groups. However, HRMS users can see a restricted set of information in records from more than one business group within a single responsibility if the HR:Cross Business Profile profile option is set to Yes. In addition, you can use people management templates to query and update worker information across business groups using a single responsibility.

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

See: Setting up Reporting Users, page 1-26

To define a security profile:

1. Enter a name for the security profile.

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

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

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

Applying Restrictions by Person Type

4. You can choose to apply the security restrictions you set up to employees, applicants, contingent workers, contacts, candidates or any combination of these.

   > **Note:** You can only restrict access to candidates if you have iRecruitment installed. If you do not have iRecruitment, the application uses the default setting of *All* for the View Candidates box.

   For example:

   - If you want the security restrictions to apply to employees, select Restricted from the View Employees box.
   - To ignore the security restrictions for employees and allow access to all employees, select All from the View Employees box.
   - To prevent access to any employee records, even if the other security restrictions allow access, select None from the View Employees box.

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

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

   - All: Access is unrestricted, so that all people of type Other are visible to the security profile

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

Allowing Access to Granted User Records (SSHR only)

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

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

Restricting Access by Individual Assignment

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

   For more information on restricting by individual assignment and securing your forms, see: Assignment-Level Security, page 1-34.

Restricting Access by Organization

7. In the Organization Security tabbed region:

   - To restrict by organization list, select the Secure organizations by organization hierarchy and/or organization list option in the Security Type poplist. Select the organizations in the Organization Name field, and choose the Include option button.

   - To restrict by organization hierarchy, select the Secure organizations by organization hierarchy and/or organization list option. Select an organization hierarchy, and a top organization. Select the Include Top Organization option if you want to allow access to this organization.

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

Maintenance process is run).

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

> **Note:** The Secure organizations by single operating unit and Secure organizations by operating unit and inventory organizations options are for use by non-HRMS users, page 1-24, and have no effect on the HRMS application.

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

Restricting Access by Position (not Global Security)

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

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

Restricting Access by Payroll (not Global Security)

10. In the Payroll Security tabbed region:

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

Restricting Access by Supervisor

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

supervisor assignment or based on a person's supervisor.

For more information, see: Security Profiles for Supervisor Security, page 1-42.

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

> **Note:** When you set up security based on supervisor hierarchies, you can choose to generate the list of employees visible to a user at the start of the session (user-based security). For supervisors with a large number of subordinates (for example, at higher management levels) leaving the Maximum Hierarchy Levels box blank may result in a delay in generating the list. You can improve performance by limiting the number of hierarchy levels a supervisor can access or by using the Static List functionality.
>
> For more information, see: Static Lists, page 1-33.
>
> Alternatively, for the highest levels of management, consider setting up security using organization hierarchies.

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

Miscellaneous Restrictions

13. The list of people whose records are accessible using a security profile can change with the user name of the person who logs in (if you are using user-based security). If you want the application to evaluate permissions based on a specific person (and not vary depending on the user name of the person who logs in) enter a name in the Named User field. For example, to set up supervisor-based security for reporting users who do not have any association with employees, enter the name of a person at the required supervisory level.

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

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

Restricting Access by Custom Security

14. In the Custom Security tabbed region, select the custom restriction option. The

options are as follows:

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

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

- Restrict the people visible to each user using this profile

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

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

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

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

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

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

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

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

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

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

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

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

Using Static Lists

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

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

18. To include a specific user or group of users in the next Security List Maintenance run, select the Process in Next Run option for those users.

19. Save your work.

What's Next

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

See: Security Processes, page 1-17

See: Running the Security List Maintenance Process, page 1-56

Assigning Security Profiles

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

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

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

When you navigate to the Assign Security Profile window, the Find Security Profile Assignments window displays automatically. Select New to create a new assignment. For information about querying existing security profile assignments, see Using the Find Security Profile Assignment window, page 1-55.

To assign a new security profile:

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

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

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

5. Enter the time period of security profile assignment.

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

6. Save the security profile assignment.

To end a security profile assignment:

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

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

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

Using the Find Security Profile Assignment window

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

If you want to set up a new security profile assignment select the New button. For more information on setting up new security profile assignments, see Assigning Security Profiles, page 1-54.

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

To query a security profile assignment:

1. Enter a full or partial query on one, a selection or several of the following:
   - User name
   - Application
   - Responsibility
   - Business group
   - Security profile

   > **Note:** If you enter a value in either the Business Group or the Security Profile field, any value entered in the other field is blanked

out if it is not valid to select both. For example, you cannot select both business group A and a security profile which is specific to business group B.

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

3. Choose the Find button.

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

Running the Security List Maintenance Process

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

See Security Processes, page 1-17

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

To run the Security List Maintenance Process:

1. In the Name field, select Security List Maintenance.

2. In the Parameters window, enter the date for which you want to run the report in the Effective Date field. If you do not enter a date the process runs for the current system date.

3. In the Generate lists for field, select the range of security profiles for which you want to run the process. You can choose to update:

   - All Global Security Profiles (all profiles created using the Global Security Profile window)
   - All Security Profiles
   - All Security Profiles in One Named Business Group
   - One Named Security Profile

- One Specified User in One Named Security Profile

4. If you have selected All Security Profiles in One Named Business Group, select a business group.

5. If you have selected One Named Security Profile, select a security profile.

6. If you have selected One Specified User in One Named Security Group, select a security profile and the user name.

7. In the Process field, select the type of people to be processed. You can choose from the following values:

   - Current people only
   - Terminated people only
   - Current and Terminated people

   Note: If you have selected One Named Security Profile, the only available option is Current and Terminated people.

8. In the Static User Processing field, choose whether to run the process for all static users or only those users selected for inclusion in the next processing run (selected on the Static Users tab of the Security Profile window).

   Note: You can use this parameter only if you have chosen a processing option other than One Specified User in One Named Security Group.

9. Choose OK.

10. Complete the batch process details and choose the Submit button.

Running the Change Candidate Access for Security Profiles Process

This process enables you to change candidate access settings for your security profiles. This process is intended for use only if you use iRecruitment.

Warning: The process changes the candidate access settings for **all** security profiles except the default View All security profiles that the system creates automatically when you create a business group. You should be aware of this before you run the process.

System Implications

With the introduction of Candidate Security, the default setting for the View Candidates box in the Define Security Profiles window is All. However, if you use both Oracle HRMS and iRecruitment, you will generally have some security profiles that should allow access to candidates and some that should not allow access. In this case, you can run the Change Candidate Access for Security Profiles process to override the security settings.

For example, if the majority of your security profiles should allow access to candidates, you can run the process with the View Candidates parameter set to All. This would reset the candidate access for all security profiles. Then, you could manually change the View Candidates setting to None for those security profiles that should not allow candidate access using the Define Security Profiles window.

See: Defining Security Profiles, page 1-29

You run the Change Candidate Access for Security Profiles process from the Submit Requests window.

Prerequisites

❒ This process is not delivered in any request sets or groups. To use the process, you need to add the process to a request group and, if applicable, a request set.

See: Organizing Programs into Request Groups, *Oracle Applications System Administrator's Guide*

See: Organizing Programs into Request Sets, *Oracle Applications System Administrator's Guide*

To run the Change Candidate Access for Security Profiles process:

1. In the Name field, select Change Candidate Access for Security Profiles.
2. In the View Candidates field of the Parameters window, select one of the following values:
   - All

     Select this value to update your security profiles to include candidates.
   - None

     Select this value to update your existing security profiles to exclude candidates.
3. Choose OK and submit the process.

User Profiles

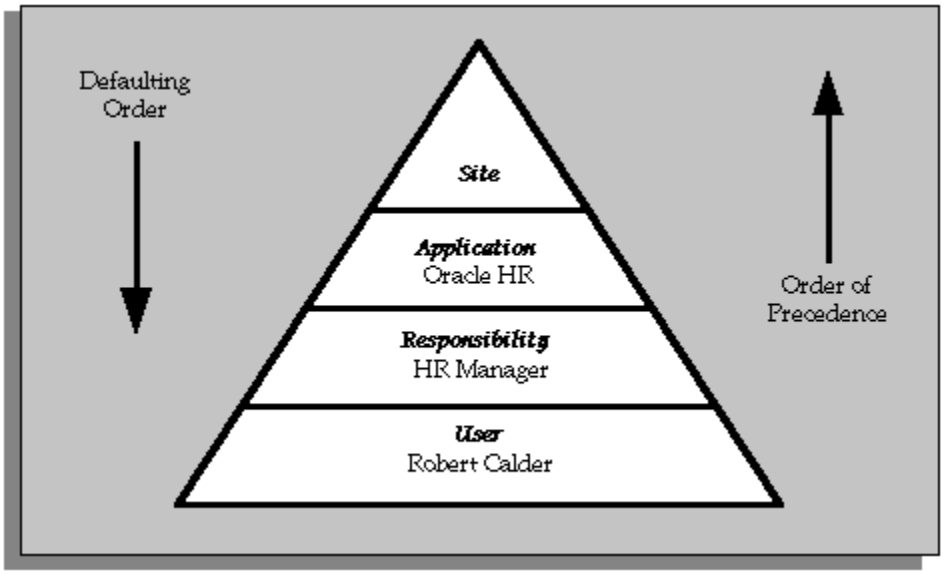
User Profiles

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

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

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

Levels For Setting User Profile Options



Tip: Set site-level options first to ensure that all options have a default. If a profile option does not have a default value, it might cause errors

when you use windows, run reports, or run concurrent requests.

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

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

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

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

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

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

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

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

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

Profile Options Summary

The table below indicates whether users of the system can view or update the profile option, and at which System Administrator levels (either user, responsibility, application, or site) the profile options can be updated. These System Administrator

levels are included in the table as Site, App, Resp, and User.

For the User column, Yes indicates that you can update the profile, View Only indicates that you can view the profile but you cannot update it, and No indicates that you can neither view nor update the profile.

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

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

Summary of Profile Options

Profile Option	Admin UpdateLevels	User	Required	Default Value
Apply Assessment Competencies to Person	Site	Yes	No	No
AME:Installed	App	Yes	No	NA
AuditTrail:Activate	AppSite	No	No	No
BEN:BEN HOURLY ANNUALIZATION FACTOR	SiteAppResp	Yes	No	2080
BEN:Benefits Preferred Currency	SiteAppRespUser	Yes	No	NA
BEN:Compensation Manager	SiteAppRespUser	Yes	No	NA
BEN:Comp Objects Display Name Basis	SiteApp	No	No	Session
BEN: Cross Business Group for Plan Design Copy	SiteAppResp	Yes	No	Yes
BEN: CWB Approval Mode	Site	No	No	Submission at any time

Profile Option	Admin UpdateLevels	User	Required	Default Value
BEN: CWB Allocation as Percent of Eligible Salary Decimals				
BEN: CWB Budget as Percent of Eligible Salary Decimals				
BEN: CWB Budget Rows Displayed	SiteAppRespUser			
BEN: CWB Download Expire Seconds	SiteAppRespUser	Yes	No	60
BEN:CWB Display Currency Type	SiteAppRespUser	Yes	No	Corporate Currency
BEN: CWB Encrypt/Decrypt Key	SiteAppRespUser	No	No	NA
BEN: CWB Estimated Market Price	SiteAppRespUser	Yes	No	NA
BEN: CWB History Type Display	SiteAppResp	Yes	No	Basic Stock History
BEN: CWB Home Plans Displayed	SiteAppRespUser	Yes	No	NA
BEN: CWB Layout Lock Time	SiteAppRespUser	Yes	No	10
BEN: CWB Maximum Number of Layouts	SiteAppRespUser	Yes	No	10
BEN: CWB Plan Context for Reporting	Site	Yes	No	Plan
BEN: CWB Spreadsheet Version	SiteAppRespUser			

Profile Option	Admin UpdateLevels	User	Required	Default Value
BEN:CWB Summary Level	SiteAppRespUser	Yes	No	NA
BEN:CWB Table Population	SiteAppRespUser	Yes	No	
BEN: CWB Valid Grade Filtering	SiteAppRespUser	Yes	No	Yes
BEN: CWB Validate Performance/Assignment Changes Online	SiteAppRespUser	Yes	No	No
BEN: CWB Wizard Compratio Range	SiteAppRespUser	Yes	No	5
BEN: CWB Wizard Years Worked Range	SiteAppRespUser	Yes	No	1
BEN: CWB Worksheet Rows Displayed	SiteAppRespUser			
BEN:Designation No Change	SiteAppResp	Yes	No	No
BEN:Eligible Profile Rule	SiteAppResp	Yes	No	AND
BEN: Enable Absence Plans Functionality	SiteAppResp	Yes	No	No
BEN:Enable Quartile in Grade Life Event	SiteAppResp	Yes	No	Yes
BEN:Imputed Income Post Tax Deduction	SiteAppRespUser	Yes	No	No
BEN:Max Extract Line Size	SiteAppRespUser	Yes	No	10000

Profile Option	Admin UpdateLevels	User	Required	Default Value
BEN:VAPRO Rule	SiteAppResp	Yes	No	AND
DateTrack:Date Security	SiteAppRespUser	Viewonly	No	NA
DateTrack:Delete Mode	-	-	Not in use	
DateTrack:Enabled	App	Viewonly	NA	NA
DateTrack:Login Date (YYYY/MM/DD)	SiteAppRespUser	Viewonly	NA	NA
DateTrack:Override Mode	-	-	Not in use	
DateTrack:Reminder	SiteAppRespUser	Yes	No	No
DateTrack:Update Mode	-	-	Not in use	
Disable Self-Service Personal	SiteAppRespUser	Yes	No	No
Display Messages	SiteAppRespUser	Yes		
Enable Security Groups	SiteApp	No	Yes	Security groups are not enabled
Flexfields:Open Descr Window	SiteAppRespUser	Yes	Yes	Yes
Flexfields:Open Key Window	SiteAppRespUser	Yes	Yes	Yes
Help Localization Code	RespUser	Yes	Yes, by HRMS	The Responsibility is associated with the Global set of help files rather than a localized or verticalized set.

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Absence Duration Auto Overwrite	SiteResp	No	No	No
HR: Absence Start Date	SiteAppRespUser	No	No	The start date of the Absence being recorded on the Absence form
HR: Absence View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: Accrual Plan Element Set Displayed to User	SiteAppRespUser	Yes	No	Null
HR:Action Parameter Group Name	SiteAppRespUser	Yes		
HR: Actions - Validation	SiteAppRespUser	Yes	No	Validate all Functions
HR:Allow Approver Updates to Self Service Actions	Site	No	No	No
HR:Allow Concurrent Self Service Actions	Site	No	No	No
HR:Allow Functions Access During Hrglobal Run	View only	Viewonly	No	No
HR:Allow Online W-2 Viewing as of (MM/DD)	SiteAppRespUser	Yes		
HR:Allow Processing of Ineligible Self Service Actions	Site	No	No	No
HR:Allow Use of Eligibility for Self Service Actions	Site	No	No	No

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Applicant Assignment Cleanup Run Mode	Site	No	No	In Patch Process
HR: Applications View Layout	SiteAppRespUser	Viewonly	No	FORM or TABLE
HR: Appraisal Template Lov	SiteAppRespUser	Yes	No	No
HR: Appraisee Can Add Participants	SiteAppRespUser	No	No	Yes
HR: Assignment ID	-	-	Internal use only.	
HR: Authoria Integration Enabled	SiteAppRespUser	Yes	Yes (if linking to Authoria HR)	No
HR: Authoria UK URL	Site	No	Yes (if linking to Authoria HR)	
HR: Authoria US URL	Site	No	Yes (if linking to Authoria HR)	
HR: Auto Apply Collective Agreement Entitlements	SiteAppResp	Yes	Yes	No
HR: Auto Evaluate Collective Agreement Entitlements	SiteAppResp	No	Yes	No

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Automatically synchronize single GL company cost centers with HR	Site	Yes	Yes	No
HR: Base Salary Required	Site	No	No	Null
HR: BIS Job Hierarchy - Job Grouping Level 1	Site	No	No	Null
HR: BIS Job Hierarchy - Job Grouping Level 2	Site	No	No	Null
HR: BIS Reporting Hierarchy	-	-	Obsolete.	
HR:Blank Effective Date	SiteAppRespUser	Yes	No	No
HR:Business Group	SiteResp	Viewonly	Yes	Default Setup Business Group at Site level.
HR: Cancel Application	SiteAppResp	Viewonly	No	Default is Null. This is interpreted by the system as No.
HR: Check Entitlement Cache	SiteAppResp	No	Yes	Yes
HR: Collective Agreement Logging	SiteAppRespUser	Yes	Yes	Low
HR:Contingent Worker Manager Actions Menu	SiteAppRespUser	Yes	Yes	Contingent Worker Manager Actions Menu
HR:Contingent Worker Personal Actions Menu	SiteAppRespUser	Yes	Yes	Contingent Worker Personal Actions Menu
HR: Copy period details for budget	SiteAppRespUser	Yes	No	Default is No.

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Cross Business Group	Site AppResp	Viewonly	NA	Default is No.
HR: Cross BG Duplicate Person Check	SiteAppResp	No	No	Yes
HR: CWK in Head Count Reports	SiteAppRespUser	Yes	No	Yes
HR: Data Exchange Directory	SiteAppResp	Viewonly	No	
HR: Data Migrator Business Group Lockout	Site	No	NA	NA
HR:Data Pump Action Parameter Group	SiteAppRespUser	Yes	No	Null
HR: Date From	-	-	Internal use only.	
HR:Default Assignment Costing	SiteAppRespUser	Yes	No	.
HR:Default Check/Cheque Number Method	SiteAppRespUser	Yes	No	Null
HR: Default Correspondence Language	SiteAppRespUser	Yes	No	No default.
HR: Default Full Name Format	SiteAppRespUser	Viewonly	No	Surname Prefix Initials Prefix (Partner) Surname (Partner)
HR: Default Nationality	SiteAppRespUser	Yes	No	NA
HR: Defer Update After Approval	SiteAppRespUser	Yes	Yes	Yes

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Disable Ethnicity Tab	SiteAppRespUser	Viewonly	No	Enabled
HR: Disallow Template Reference	SiteAppRespUser	Yes		
HR: Display All Candidate Offers	-	-	Obsolete.	
HR:Display Competencies	SiteAppresp	Yes		
HR:Display Brief Person Name	Site	No	No	No
HR:Display Person Name	SiteAppRespUser	Yes	No	Brief Name
HR:Display Person Search	SiteAppRespUser	Yes	No	Yes
HR: Display Position Hierarchy	Site	No	No	No
HR:Employee Directory Global Menu	Site	No	No	Employee Directory Global Menu
HR: Employment View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR:Enable Bank Branch Validation	SiteAppRespUser	Yes	No	Null
HR:Enable Security for Batch Element Entry	SiteAppRespUser	Yes	Yes	
HR: Enable DTW4 defaulting	Site	Viewonly	No	Yes

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Enable Multiple Assignments in SSHR	SiteAppRespUser	Yes	No	No
HR:Enforce Costing Mandatory Segment Check at Data Entry	SiteAppRespUser	Yes		Default is Null. This is interpreted by the application as No.
HR:Execute Legislative Check Formula within Run	SiteAppRespUser	Yes	No	NA
HR: Expand Role of Contingent Worker	Site	Yes	Yes	Default is Null. This is interpreted by the application as No.
HR: Extension Agent	SiteUser	No	No	
HR: Extension Agent Client Timeout		Yes	No	NA
HR: Extension Agent Enabled	Site	No	Yes (if using Info online)	No
HR: FastFormula Debug Level	SiteAppRespUser	Yes	NA	NA
HR: Free text school name allowed in Self Service	SiteAppRespUser	Yes	No	Null
HR:French HRMS check mandatory payroll assignment attributes exist	SiteAppRespUser	Yes		Yes
HR: FTE Factor				

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: GL Cost Center Org Classifications	Site	Viewonly	Yes (if you want to use Auto Orgs to synchronize GL cost centers with HR)	None
HR: GL Cost Center Synchronization Options	Site	Viewonly	No - This profile option is obsolete.	NA
HR: GL Organization Name Format	Site	Viewonly	Yes (if you want to use Auto Orgs to synchronize GL cost centers with HR)	NA
HR:Global Competence Flex Structure	Site	Viewonly	Yes (if you want to create global competencies)	NA
HR:Grade Key Flex-Identify 1st Segment	SiteAppResp	Yes	No	NA
HR:Grade Key Flex-Identify 2nd Segment	SiteAppResp	Yes	No	NA
HR:HR/Payroll Representative Source	Site	Viewonly	No	No default
HR:Hide Work Phone on Person		-	Obsolete.	

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:IE P35 Reporting Year	Site	Yes	Yes	NA
HR: Info Online: Open in New Window		No	No	
HR: Info Online: RIA Password	SiteAppRespUser	Yes		
HR: Info Online: RIA Username	SiteAppRespUser	Yes		
HR: Info Online Toolbar Icon	NA	NA	No	
HR: Info Online: Use Field Context	SiteAppRespUser	Yes		
HR: Informal Name Format	Site	No	No	NA
HR:Job Key Flex-Identify 1st Segment	SiteAppResp	Yes	No	NA
HR:Job Key Flex-Identify 2nd Segment	SiteAppResp	Yes	No	NA
HR: Job Level	SiteAppResp	No	No	NA
HR: KI Framework Version	SiteAppRespUser	Yes	Yes	Default is Null. This is interpreted by the system as Version 1.
HR: KI Maximum Topics and Integrations	SiteAppRespUser	Yes	No	Default is Null. This is interpreted by the system as Version 3.
HR: Local or Global Name Format	SiteAppRespUser	Yes	No	Local Format

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Localization in SSHR	-	-	Valid for SSHR 3.4 only.	
HR: Location ID	-	-	Internal use only.	
HR: Local Nationality	-	-	-	No default value exists, and the system administrator can set the value at any level.
HR:Manage Self Service Actions When Future-Dated Changes Exist	Site	No	No	Stop with an Error
HR:Manager Actions Menu	SiteAppRespUser	Yes	Yes	Manager Actions Menu
HR: Manager Appraisals Menu	SiteAppRespUser	Yes	No	Manager Appraisals Menu
HR: Mask Characters	SiteAppRespUser	No		
HR: Metalink Integration Application	SiteAppRespUser	Yes	No	Human Resource Management Systems
HR: Metalink Integration Enabled	SiteAppRespUser	Yes	No	Yes
HR:Monitor Balance Retrieval	SiteAppRespUser	Yes	No	
HR:NI Unique Error or Warning	SiteResp	No	No	NA
HR:National Identifier Validation	SiteAppRespUser	No	No	Error on Fail

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Non-Updateable Element Set	SiteAppRespUser	Yes	No	NA
HR: Number Separator	Site	No	No	NA
HR:OAB New Benefits Model	SiteAppRespUser	Yes	No	NA
HR: Offers - Hiring Manager Initiation	-	-	Obsolete	
HR:Online Tax Forms Update Method	SiteUser	Viewonly	No	All
HR: Organization ID	-	-	Internal use only.	
HR: Override Grade Defaults	SiteAppRespUser	Yes	No	Defaults to Yes
HR:Payroll Payments Self-Service Enable Multiple Assignments	SiteAppRespUser	Yes	No	No
HR:Payroll Payments Self-Service Payments List Mode	SiteAppRespUser	Yes	No	Null
HR:Performance View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: Person ID	-	-	Internal use only.	
HR:Personal Actions Menu	SiteAppRespUser	Yes	Yes	Personal Actions Menu
HR:Personal Info Check Pending	-	-	Obsolete.	

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: PL NI Unique Error or Warning	SiteAppRespUser	Yes	Yes	Warn
HR:Position Key Flex-Identify 1st Segment	SiteAppResp	Yes	No	NA
HR: Position Default Options for SSHR	SiteAppRespUser	Yes	Yes	Default with User Decision
HR:Position Key Flex-Identify 2nd Segment	SiteAppResp	Yes	No	NA
HR:Propagate Data Changes	Site	Yes	No	Default is Null. This is interpreted by the application as No.
HR:Purge Element Entry Permission	SiteAppRespUser	Viewonly	NA	NA
HR:Query Only Mode	SiteAppRespUser	Viewonly	No	NA
HR: Refresh Self Service Actions with Data from Intervening Actions	No	No	No	No
HR: Restrict Letter by Vacancy or Event	Site	Viewonly	No	Default is Null
HR:Restrict Transactions across Legislations for SSHR	SiteResp	No	No	No
HR: RIA Integration Enabled	SiteAppRespUser	Yes	No	Yes
HR:Run BENMNGLE When Processing a Self Service Action	Site	No	No	No

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Salary View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: Save and Stay in Appraisals Page	SiteUser	Yes	No	Yes
HR: Schedule Based Absence Calculation	SiteResp	No		
HR: Security Profile	SiteResp	No	Yes	Default view-all security profile at Site level
HR: Self Service HR Licensed	Site	No	No	Defaults to No
HR:Self Service Hire and Placement Default Values	SiteAppRespUser	No		Yes
HR:Self-Service Save for Later	Site	No	No	Yes
HR: Servlet Timeout	SiteAppRespUser	Yes	No	Default is Null. This is interpreted by the system as 40 (seconds).
HR: SM Employee Find Work Opp Menu	Resp	No	Yes	HR_SM_EMP_PERSONAL_FUNCTIONS
HR: SM Manager Find Person Menu	Resp	No	Yes	HR_SM_MANAGER_FUNCTIONS
HR: SM Manager Find Work Opp Menu	Resp	No	Yes	HR_SM_PERSONAL_FUNCTIONS
HR:Subrogation	SiteAppRespUser	Yes	No	No
HR: Supervisor Hierarchy Usage	Site	Yes	No	

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:TCA Unmerge Options	Site	No	No	In Patch Process
HR:Training View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: US Address Line Length	SiteAppRespUser	Yes	Yes	NA
HR: Use Fast Formula Based PTO Accruals	Site	No	Yes	No
HR:Use Global Applicant Numbering	Site	Viewonly	Yes	No
HR:Use Global Contingent Worker Numbering	Site	Viewonly	Yes	No
HR:Use Global Employee Numbering	Site	Viewonly	Yes	No
HR:Use Grade Defaults	SiteAppRespUser	Viewonly		Defaults to Yes
HR:Use Standard Attachments	SiteAppRespUser	No	Yes	Yes at Site Level, No at Seeded Responsibility Level
HR:User Type	AppResp	Viewonly	Yes	NA
HR: Use Title in Person's full name	Site	No	NA	Yes
HR: Verification External Node	SiteResp	No	Yes	No default value
HR: View Payslip From Date for WEB (MM/DD/YYYY)	SiteAppRespUser	Yes	Yes	01/01/1997

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:View Unpublished Employee 360 Self Appraisal	SiteAppResp	Yes	No	Default value is Null
HR: Views Layer Size	SiteAppRespUser	Yes	Yes	300 pixels
HR:Webapps Tips Test Mode	User	Yes	No	No
HR: Web Proxy Host		No		
HR: Web Proxy Port		No		
HR: Worker Appraisals Menu	SiteAppRespUser	No	Yes	Employee Appraisals Menu
HRI: Collect Manager Snapshots	Site	No	Yes	Yes
HRI: Collect Open Enrollment in Progress	Site	No	Yes	No
HRI:DBI Chief HR Officer Named User	Site	No	Yes	No
HRI:DBI Force Foundation HR Processes	Site	No	Yes	No
HRI:DBI Link to Transaction System	Site	No	Yes	Disable Link
HRI:Enable Benefits Collections and Event Queue	Site	No	Yes	Yes
HRI:Enable Captured Events Archive	Site	No	Yes	No

Profile Option	Admin UpdateLevels	User	Required	Default Value
HRI:Enable Detailed Logging	Site	No	Yes	No
HRI: Manager Snapshot Threshold	Site	No	Yes	2500
HRI:Multithreading Chunk Size	Site	No	Yes	200
HRI:Number of Threads to Launch	Site	No	Yes	8
HRI:Period of Service / Placement Date Start Source	Site	No	Yes	Start Date
HRI:Populate Assignment Events Queue	Site	No	Yes	Yes
HRI:Populate Supervisor Hierarchy Events Queue	Site	No	Yes	Yes
HRI:Populate Supervisor Status History Events Queue	Site	No	Yes	Yes
HRI: Workforce in Period Calculation Method	Site	No	No	Null
HZ: Protect HR Person Information	Site	No	No	No
Limit By Persons Organization	SiteAppRespUser	Yes	No	No
OAB: Enable Self-Service Benefits Trace		Yes	No	Null
OAB:Self Registered User Responsibility	SiteAppRespUser	Yes	No	Self Registered Employee Default responsibility

Profile Option	Admin UpdateLevels	User	Required	Default Value
OAB:User to Organization Link	SiteAppRespUser	Yes	No	Null
OAB:User to Payroll Link	SiteAppRespUser	Yes	No	Null
PAY: Display Reset Years in Payroll	SiteAppRespUser	Yes	No	No
PAY: Generate Periods for Tax Year	SiteAppRespUser	Yes		
PAY:Statement of Earnings User Category	SiteRespUser	Yes		
PER:Automatic Save	Site	Yes		
PER:Navigation	Site	Yes		
Personalize Self-Service Defn	SiteAppRespUser	Yes	No	No
PO: Services Procurement Enabled	Site	Viewonly	No	No
Talent Management Source Type	Site	Yes	Yes (if you enable automatic update of competency profiles)	NA
Workforce Measurement Type	Site	No	Yes	

Profile Options

Apply Assessment Competencies to Person

Controls whether HRMS updates an appraisee's competency profile automatically

when an appraisal is complete. Set this option to Yes to enable automatic update of competency profiles.

AME:Installed

Determines whether Oracle Approvals Management (AME) is installed. Integrating applications such as Internet Expenses or iProcurement use this profile option to indicate if AME is installed.

AuditTrail:Activate

Determines whether the AuditTrail functionality is enabled or disabled.

When you enter or update data in your forms, you change the database tables underlying the forms you see and use. AuditTrail tracks which rows in a database table were updated at what time and which user was logged in using the form(s).

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

BEN:BEN HOURLY ANNUALIZATION FACTOR

Determines how to convert an hourly rate to an annual rate, and vice versa, if you want to use the Hourly activity reference period for Compensation Workbench plans. The default value is 2080 hours (8 hours * 5 days * 52 weeks).

BEN:Benefits Preferred Currency

Controls the preferred currency in which a manager views and enters budget and worksheet distributions for the Compensation Workbench. Actual amounts are paid in the currency of the Compensation Workbench plan, not the preferred currency.

BEN:Compensation Manager

Gives access to features in the Compensation Workbench that are available only to Compensation Managers.

BEN:Comp Objects Display Name Basis

Determines whether the compensation object names displayed in various application windows (both in the professional and self-service user interfaces) are based on the user's session date or the life event occurred on date.

BEN: Cross Business Group for Plan Design Copy

Controls whether a user can copy plan design data between business groups using the Plan Design Copy function. The default value for the profile option is 'Y.' If you set the value to 'N,' the user will only be able to export a plan design or copy the plan design within the business group attached to their responsibility.

Ben: CWB Approval Mode

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

BEN: CWB Allocation as Percent of Eligible Salary Decimals

Determines if the application displays decimals for percent of eligible salary based on allocated amounts.

BEN: CWB Budget as Percent of Eligible Salary Decimals

Determines if the application displays budgets as percent of eligible salary

BEN: CWB Budget Rows Displayed

Controls the number of rows available for display on budgetsheets, for example, if you set the profile option to 10, then managers and compensation administrators can choose to display between 1 and 10 rows on their budgetsheets.

BEN: CWB Download Expire Seconds

Specifies the length in seconds available to download worksheets. The default value is 60 seconds. Increase this value if you have problems downloading large worksheets.

BEN:CWB Display Currency Type

Determines the last selected currency in Compensation Workbench for each manager. The application displays this value the next time managers log into CWB.

BEN: CWB Encrypt/Decrypt Key

Determines the key the application uses to decrypt security key information for downloaded Compensation Workbench worksheets. You can modify this key to any characters, however you must not change the key between a download and an upload.

BEN: CWB Estimated Market Price

This profile controls the estimate market price that the application uses to calculate the walk-away value of stock option grants. This is the default value of the market price that displays on the Extended Stock Option History page and Employee Stock Option History Report. Managers can override the value in CWB, which is retained for the session. However, the value defaults to the profile value upon re-login or session loss.

BEN: CWB History Type Display

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

BEN: CWB Home Plans Displayed

This determines how many plans the application displays on the home page before table navigation links display. The recommended value is 5 or more.

BEN: CWB Layout Lock Time

BEN: CWB Maximum Number of Layouts

BEN: CWB Plan Context for Reporting

Determines the Plan Name and Period that the application uses to obtain the Manager Hierarchy and Employee Information for the Reports available from the CWB Home Page. If you do not specify a Plan Name and Period, then the application uses the latest plan for which the manager is a participant. The Employee Stock Option History, and Employee Compensation History use this profile option.

BEN: CWB Spreadsheet Version

Controls the versions of MS Excel available for download of spreadsheets from CWB.

BEN:CWB Summary Level

Determines the last viewed display of the worksheet summary for each manager. The application displays this value during the next session. By default, this is set to Direct Employees.

BEN:CWB Table Population

Determines the last selected population filter on the worksheet. The application displays this value during the next session. By default, this is set to Direct Employees.

BEN: CWB Valid Grade Filtering

Determines if the application validates grades. If you set this profile to Yes (default), then the application displays only valid grades for a proposed job/position within the business group. If you set this profile to No, then the application displays all grades for the business group.

BEN: CWB Validate Performance/Assignment Changes Online

Determines if the application validates assignment changes online. If you set the profile option to Yes, then you enable assignment API edits for the worksheet and the application enforces the integrity between jobs, positions, and grades. If you set this profile option to No (default), then API edits are not online and the Compensation Workbench Post Process validates all assignment changes.

BEN: CWB Wizard Compratio Range

Determines the incremental range that displays on all pages using comparatio criteria. For example if you use 5, then the application displays comparatios in 5% ranges. The Allocation Wizard criteria option, the Employee Stock Option History report, the Employee Compensation History report, and the Summary By Directs report use this profile option. The default value is 5.

BEN: CWB Wizard Years Worked Range

Determines the incremental range that displays on all pages using Years Worked criteria. For example if you use 5, then the application displays the Years Worked in 5 Year Ranges. The Allocation Wizard criteria option, the Employee Stock Option History report, Employee Compensation History report, and the Summary By Directs report use this profile option. The default value is 1.

BEN: CWB Worksheet Rows Displayed

Controls the number of rows available for display on worksheets, for example, if you set the profile option to 10, then managers and compensation administrators can choose to display between 1 and 10 rows on their worksheets.

BEN: Designation No Change

Determines the contents of the Dependent Eligibility Audit log. If you set the profile option to No (the default value), the audit log returns information only for dependents with eligibility changes. If you set it to Yes, the audit log returns all dependents, even if they have no eligibility change.

BEN:Eligible Profile Rule

Controls how FastFormula rules are evaluated in an eligibility profile. The default value is AND. This means that a participant must satisfy all the rules you attach to an eligibility profile. If you set the profile option to OR, the participant need only satisfy one of the rules.

BEN:Enable Absence Plans Functionality

Displays the Enroll Absences button on the Absence Detail window. If you set this profile option to Yes for the users or responsibilities who will enter absences for absence

benefit plans, they can run the Participation Process to process the absence life events.

BEN:Enable Quartile in Grade Life Event

Detemines whether the system triggers the Quartile in Grade Life Event when a change in a person's grade, salary basis, or salary moves them into a new quartile in grade. If you set this profile option to Yes, these conditions trigger the Quartile in Grade life event. If you set this profile option to No, the system never creates a Quartile in Grade potential life event.

BEN:Imputed Income Post Tax Deduction

Controls whether after-tax employee contributions are deducted from the imputed income total for a benefits plan subject to imputed income. If you set this profile set to N (the default value) the application assumes that the employer pays 100% of the given benefit.

BEN:Max Extract Line Size

Sets the maximum length of a record generated by the Extract Write Process for compensation and benefits system extracts.

BEN:VAPRO Rule

Controls how FastFormula rules are evaluated in a variable rate profile (VAPRO). The default value is AND. This means that a participant must satisfy all the rules you attach to a variable rate profile. If you set the profile option to OR, the participant need only satisfy one of the rules.

DateTrack:Date Security

Controls the way users can change their effective date:

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

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

See: How DateTrack Works, *Oracle HRMS Implementation Guide*

DateTrack:Enabled

Controls whether the DateTrack functionality is enabled. Set to Yes at the Application

level for Oracle HRMS.

See: How DateTrack Works, *Oracle HRMS Implementation Guide*

DateTrack:Login Date (YYYY/MM/DD)

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

DateTrack:Reminder

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

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

Disable Self-Service Personalizations

Controls whether personalizations created for self-service functions using the Personalization Framework are applied. If the profile option is Yes, no personalizations are applied and only the original definition of each self-service page is displayed.

This profile option is used in SSHR.

Enable Security Groups

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

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

Change the profile option to Yes at application level *only* if your enterprise is implementing a Security Groups Enabled system (multiple security groups). If you change the profile option to Yes, you must run the Enable Multiple Security Groups process. See Security Models, page 1-6.

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

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

Flexfields:Open Descr Window

Determines whether a descriptive flexfield window automatically opens when you navigate to the corresponding field.

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

Flexfields:Open Key Window

Determines whether a key flexfield window automatically opens when you navigate to the corresponding field.

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

Help Localization Code

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

Help Localization Code	Localization
AE	UAE
AU	Australia
BE	Belgium
CA	Canada
CN	China

Help Localization Code	Localization
DE	Germany
DK	Denmark
ES	Spain
FD	US Federal
FI	Finland
FR	France
HK	Hong Kong
HU	Hungary
IE	Ireland
IN	India
IT	Italy
JP	Japan
KR	Korea
KW	Kuwait
MX	Mexico
NL	Netherlands
NO	Norway
NZ	New Zealand
PL	Poland
RU	Russia

Help Localization Code	Localization
SA	Saudi Arabia
SG	Singapore
SE	Sweden
UK	UK
US	US
ZA	South Africa

Note: These entries must be in upper case.

HR: Absence Duration Auto Overwrite

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

See: Absence Recording, *Oracle HRMS Compensation and Benefits Management Guide*

HR: Absence View Layout

Controls whether a manager sees the Detail Summary View in a Form or Tabular Format.

This profile option is used in SSHR.

HR: Accrual Plan Element Set Displayed to User

Enables the display of accrual balances in the SSHR Leave of Absence page, when you attach the required element set to this profile at the appropriate levels.

See: Viewing Accrual Balances in SSHR, *Oracle SSHR Deploy Self-Service Capability Guide*

HR:Action Parameter Group Name

Identifies the set of action parameter values for a Data Pump run. You use action parameter values to control the Data Pump process run, for example, to enable parallel processing, to control the number of API batch calls, and to specify the number of errors allowed before the process run fails.

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

HR: Actions - Validation

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

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

This profile option is used in SSHR.

HR:Allow Approver Updates to Self Service Actions

Controls whether an approver can make updates to self-service actions. The self-service actions functionality uses Oracle Approvals Management (AME) to determine the list of approvers for the action. If you set this profile option to No, the approver can approve or reject the action or return the action to a previous approver on the chain after receiving the workflow notification. If you set this profile option to Yes, the approver can also update the action, for example, change the effective date.

See: Approving a Self-Service Action, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR:Allow Concurrent Self Service Actions

Controls whether Oracle SSHR can process multiple actions on a selected person at the same time. If you set this profile option to No, the Pending column is displayed on the Actions page. This indicates to the user whether pending transactions are present. The user can then review the pending transaction. If you set the profile option to Yes, you allow multiple simultaneous self-service actions. This means that the Pending column is not displayed, and users can perform actions against all assignments. On final approval, each action takes effect on its own effective date, superseding any actions with a previous effective date.

See: Managing Conflicting Actions, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR:Allow Functions Access During Hrglobal Run

Set this profile option to Yes to enable access to HRMS responsibilities during an hrglobal run.

HR:Allow Online W-2 Viewing as of MM/DD

Enables your employees to view and download their online W-2 statements as PDF files. You specify the month and day from when the employees can view the W-2 statements for the current year.

See: Tax Information Form (W-2) (US), *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR:Allow Processing of Ineligible Self Service Actions

Controls whether self-service users, usually managers, can process ineligible self-service actions. If you set the profile option to Yes, users can process actions for which a selected person is not eligible. They may wish to do this if the action will become eligible by its effective date.

> **Note:** This option depends on also enabling the profile option HR:Allow Use of Eligibility for Self Service Actions in order to display ineligible actions in the first instance.
>
> See: HR:Allow Use of Eligibility for Self Service Actions, page 1-91

See: Set Up Eligibility Processing, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR:Allow Use of Eligibility for Self Service Actions

Controls whether the Eligibility column is displayed on the Actions page for self-service actions. If you set this profile option to Yes, both eligible and ineligible actions are displayed on the Actions page along with the Eligibility column. The Eligibility column distinguishes between eligible and ineligible actions.

If you set this profile option to No, the Actions page only displays eligible actions and the Eligibility column is not displayed.

> **Note:** Managers will not be able to process ineligible actions unless the profile option HR:Allow Processing of Ineligible Self Service Actions is also set to Yes.
>
> See: HR:Allow Processing of Ineligible Self Service Actions, page 1-91

See: Set Up Eligibility Processing, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR: Applicant Assignment Cleanup Run Mode

Controls how the HR Applicant Assignment Cleanup script (delivered in PER Family

Pack J) is run.

See: *Guide to the HR Applicant Assignment Cleanup Process* (available on Oracle *Metalink* Note ID 295319.1)

HR:Applications View Layout

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

This User Profile Option is used in SSHR.

HR: Appraisal Template LOV

Controls whether the Appraisal Template field in V3.4 of the SSHR Appraisals function is available as a list of values (LOV) or a poplist. Set this profile option to Yes to display the field as an LOV or set it to No to display the field as a poplist.

This profile option is used in SSHR 3.4.

HR: Appraisee Can Add Participants

Controls whether appraisees can add participants to their appraisals. If yu set this profile option to Yes (the default value), appraisees can add participants. If you set this profile option to No, appraisees cannot add participants.

See: Appraisals (Self-Service), *Oracle SSHR Deploy Self-Service Capability Guide*

HR: Authoria Integration Enabled

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

See: Info Online Links to Authoria HR, page 3-132

HR: Authoria UK URL

Defines the URL of the Authoria HR engine providing UK-related content if you are using context-sensitive links from a button on the Oracle toolbar to the third-party information product Authoria HR.

See: Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR, page 3-136

HR: Authoria US URL

Defines the URL of the Authoria HR engine providing US-related content if you are using context-sensitive links from a button on the Oracle toolbar to the third-party

information product Authoria HR.

See: Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR, page 3-136

HR: Auto Apply Collective Agreement Entitlements

Controls whether values calculated for a collective agreement during the entitlement evaluation process are applied automatically to an employee. For each entitlement item, the most beneficial value that the employee is entitled to is applied. Instances where the application cannot automatically establish the most beneficial value are noted in the log file and you can manually make a selection using the Collective Agreement Entitlements window.

See: Collective Agreement Administration, *Oracle HRMS Enterprise and Workforce Management Guide*

HR: Auto Evaluate Collective Agreement Entitlements

Controls whether the entitlement evaluation process is run automatically when an employee is first placed on a collective agreement.

See: Collective Agreement Administration, *Oracle HRMS Enterprise and Workforce Management Guide*

HR:Automatically Synchronize Single GL Company Cost Centers with HR

Controls whether the Synchronize Single GL Company Cost Centers with HR concurrent program runs automatically following the creation of a new GL account code combination. You use this profile option if you have set the HR: Generate Organizations from GL profile so that organizations are automatically created in HR based on GL cost centers.

See: Implementing Automatic Company Cost Center Creation, *Oracle HRMS Enterprise and Workforce Management Guide*

HR: Base Salary Required

Controls whether the Description and Salary fields are mandatory if a person's assignment has a salary basis assigned but no pay proposal. If you set this profile option to Yes, the fields are mandatory. The user must enter values for these fields.

HR: BIS Job Hierarchy - Job Grouping Level 1

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

See: Structuring the Job Hierarchy, *Oracle HRMS Deploy Strategic Reporting (HRMSi)*

HR: BIS Job Hierarchy - Job Grouping Level 2

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

See: Structuring the Job Hierarchy, *Oracle HRMS Deploy Strategic Reporting (HRMSi)*

HR:Blank Effective Date

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

The default date can differ, depending on:

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

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

HR:Business Group

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

If you use Standard HRMS security this option is automatically set up when you enter the HR: Security Profile profile option, *except* in cases where you are using a global security profile (that is, a security profile that does not specify a business group). In this case, you must specifically set up this option for each responsibility.

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

HR: Cancel Application

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

HR: Check Entitlement Cache

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

This profile option enables you to control whether the entitlement evaluation process

first looks to see if a value for a particular entitlement exists in the cache before re-evaluating.

HR: Collective Agreement Logging

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

HR:Contingent Worker Manager Actions Menu

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

See: Actions, *Oracle SSHR Deploy Self-Service Capability Guide*

HR:Contingent Worker Personal Actions Menu

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

See: Actions, *Oracle SSHR Deploy Self-Service Capability Guide*

HR: Copy Period Details for Budget

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

HR:Cross Business Group

Controls whether users of some HRMS windows can see certain information for more than one business group.

For example, when defining contacts, you can see contacts in one business group, even if they have been created in another. Similarly, when nominating a supervisor for a person, you can select a supervisor from another business group.

In addition, if you set this option to Yes, it:

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

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

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

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

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

HR: Cross BG Duplicate Person Check

Controls the duplicate person check functionality across multiple business groups in Oracle HRMS and Oracle SSHR. Set to Yes to enable the duplicate person check functionality across business groups. Oracle HRMS uses the global name format to search for duplicate person records across business groups.

> **Note:** To use the HR: Cross BG Duplicate Person Check profile option, you must also enable the HR:Cross Business Group profile option.

For information about the global name format (Global List Name), see: Person-Name Formats, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

The following table explains the searches that Oracle HRMS performs when you set up the HR: Cross BG Duplicate Person Check and HR:Cross Business Group profile options.

Value set for HR:Cross Business Group	Value set for HR: Cross BG Duplicate Person Check	Records that Oracle HRMS searches to identify duplicate person records
No	No	HR tables in a business group. The application uses the last name, first name, date of birth, or national identifier values to search in HR tables.
No	Yes	HR tables in a business group. The application uses the last name, first name, date of birth, or national identifier values to search in HR tables.
Yes	Yes	HR tables in all business groups and TCA (Trading Community Architecture) tables. The application uses the *global name format* to search in HR tables.
Yes	No	The application does not search for duplicate person records either across multiple business groups or in a single business group.

HR: CWK in Head Count Reports

Determines whether contingent workers are included in head-count reports. The default value is Yes. Set this option to No to exclude contingent workers from head-count reports.

HR: Data Exchange Directory

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

HR: Data Migrator Business Group Lockout

This profile option is for a future release.

HR:Data Pump Action Parameter Group

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

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

HR:Default Assignment Costing

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

HR:Default Check/Cheque Number Method

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

HR: Default Correspondence Language

Specifies a default language for the Correspondence Language field.

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

HR: Default Full Name Format

Controls the default value for the full name format.

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

HR: Default Nationality

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

HR: Defer Update After Approval

Defers save of SSHR transactions after the final approval. The transaction is saved

automatically when the Workflow Background Proces runs.

This applies to Self Service.

HR: Disable Ethnicity Tab

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

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

HR:Display Competencies

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

- Apply for a Job
- Enroll in a Class

This User Profile Option is used in SSHR.

HR:Display Brief Person Name

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

HR: Display Position Hierarchy

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

HR:Employee Directory Global Menu

Enables you to specify a menu to provide global buttons in addition to the standard Self Service Global Menu buttons if a user accesses the Employee Directory anonymously. You can specify any menu with the menu type Global Menu.

See: The Employee Directory Module, *Oracle SSHR Deploy Self-Service Capability Guide*

HR: Employment View Layout

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

This User Profile Option is used in SSHR.

HR:Enable Bank Branch Validation

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

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

HR: Enable DTW4 defaulting

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

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

HR:Enable Multiple Assignments in SSHR

Controls whether a manager can view and update multiple assignments for an employee in SSHR. If you set the profile option to Yes, all the assignments of a person are displayed on the Hierarchy page. If you set the profile option to No, only primary assignments are displayed.

See: People in Hierarchy, My List, and Search Pages, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR: Enable Security for Batch Element Entry

Enables you to prevent unauthorized viewing and updating of batch lines for a confidential assignment by setting the profile option to Yes.

HR: Enforce Costing Mandatory Segment Check at Data Entry

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

HR: Execute Legislative Check Formula within Run

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

HR: Expand Role of Contingent Worker

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

You can select a contingent worker to fulfill the following roles:

- Supervisor
- Recruiter
- Interviewer
- Cost center manager
- Reviewer
- Event attendee
- Termination authority
- Manager
- Preparer
- Requester
- Approver
- Buyer

HR: Extension Agent

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

HR: Extension Agent Client Timeout

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

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

HR: Extension Agent Enabled

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

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

HR: FastFormula Debug Level

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

HR: Free text school name allowed in Self Service

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

HR:French HRMS check mandatory payroll assignment attributes exist

Determines whether to perform the mandatory checks for establishment, contract, and employee category attribution on payroll assignments when your business group is French.

HR: FTE Factor

Determines the FTE (Full Time Equivalent) factor that the application uses to calculate full-time annual pay. You can set the option to:

- **Budget Full Time Equivalent** - if you select this, then the application determines the FTE based on the information in the FTE factor unit in the Budgets region of the Person Assignment window.

- **Budget Percent of Full Time** - if you select this, then the application determines the FTE based on the information in the Head Count factor unit in the Budgets region of the Person Assignment window.

- **No Conversion** - if you select this, then the application uses an FTE factor of 1 so that no conversion occurs. This is the default value.

- **Normal Hours/Business Group Working Hours** - if you select this, then the application determines the FTE based on the information in the Working Hours fields in the Standard Conditions region of the Person Assignment window. To calculate FTE, the application divides the person's working hours by the business group's working hours.

HR: GL Cost Center Org Classifications

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

- None

- Company Cost Centers

- HR Organizations and Company Cost Centers

HR: GL Cost Center Synchronization Options

This profile option is obsolete.

HR: GL Organization Name Format

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

HR:Global Competence Flex Structure

Defines the competence key flexfield structure for use when creating global competencies. If you do not set this option, then you cannot create global competencies.

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

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

This profile option is used in SSHR.

HR: HR/Payroll Representative Source

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

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

This profile option is used in SSHR.

HR:IE P35 Reporting Year

Determines the tax year for which you want to report the P35. If you do not set this option, you cannot report P35.

HR: Info Online: Open in New Window

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

HR: Info Online: RIA Password

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

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

HR: Info Online: RIA Username

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

HR: Info Online Toolbar Icon

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

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

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

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

/OA_JAVA/oracle/apps/media

In most installations this would be the directory:

$JAVA_TOP/oracle/apps/media.

HR: Info Online: Use Field Context

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

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

HR:Informal Name Format

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

application uses the default name structure.

Use the following values:

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

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

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

This profile option is used in SSHR.

HR: Job Level

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

HR: KI Framework Version

If you are using Info Online to allow users to access information provider websites, use this profile to set the version of Knowledge Integrator Framework.

HR: KI Maximum Topics and Integrations

If you are using Info Online to allow users to access information provider websites, use this profile to set the maximum number of topics or providers to display in the Content Container before the More link appears.

HR:Local Nationality

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

Arabia Payroll only.

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

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

HR: Localization in SSHR

Identifies the localization for SSHR. This profile option is only valid for SSHR releases prior to SSHR 4.0.

HR: Local or Global Name Format

Determines whether the user sees person names in local or global formats. The value Local Format enables users to display names in a character set appropriate to their legislation. The value Global Format enables users in multinational enterprises, which generally use multiple character sets, to display person names in a single (typically, Western) character set. This option applies to the supplied Display Name and List Name formats, to edited versions of those formats, and to user-defined format masks.

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

Controls potential data conflicts if future-dated changes exist for self-service actions. If you have set the profile option HR:Allow Concurrent Self Service Actions to Yes, this profile option allows you to determine how SSHR processes the actions.

The default value for the profile option is Stop with an Error. This forces the user to choose an effective date subsequent to any future-dated change.

If you change the profile option to Allow Approval (Notify HR Rep), you allow the user to select a date prior to any future-dated changes. After final approval, the transaction is forwarded to an HR Representative for review and manual entry into the database.

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

See: Managing Conflicting Actions, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR:Manager Actions Menu

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

custom menu.

See: Actions, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR: Manager Appraisals Menu

Controls the types of appraisal a manager can initiate (for example, Standard, 360 degree) from the Appraisals home page.

HR: Mask Characters

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

HR: Metalink Integration Application

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

HR: Metalink Integration Enabled

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

HR:Monitor Balance Retrieval

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

HR: NI Unique Error or Warning

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

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

HR: National Identifier Validation

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

- **Error on Fail** (default value). If a user enters an invalid national identifier, an error message is displayed and the user cannot save the national identifier until they have entered it in the correct format.

- **Warning on Fail**. If a user enters an invalid national identifier, a warning is displayed, but the user can save the national identifier.

- **No Validation**. A user can enter and save the national identifier in any format. No validation is performed and no message is displayed.

HR:Non-Updateable Element Set

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

HR: Number Separator

Enables you to format integer, money and number values that are consistent with the ICX number format set at the Self-Service page. This profile has a value of either Yes or No. You can set it at the site level to ensure a consistent format across the application. The profile settings determine the group separator, decimal separator, and format of values. These settings will affect number formats on windows such as Element Entry, Element Description, Batch Element Entry, and User Tables.

HR: Online Tax Forms Update Method

Controls how SSHR processes multiple person assignments when dealing with tax information. SSHR supports multiple person assignments and keeps tax information for each assignment; however, since a person can file only one withholding form you must select one of the following options:

- **Primary**. Only the tax information for the primary assignment is updated when a user changes tax information using the Online Tax Form.

- **All** (default value). The tax information for all assignments is updated when a user changes tax information.

- **None.** Users cannot update tax information using the Online Tax Form. The update functionality is disabled.

See: Tax Withholdings Form (W-4) (US), *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR: OAB New Benefits Model

Enables you to set up whether you are using the new benefits model, that is, Standard or Advanced Benefits. Enter Yes, if you are using the new benefits model. Enter No, if

you are using the compensation and benefit models from previous releases.

HR: Override Grade Defaults

Controls whether the end user can override the default grade values when updating organization, position, or job information. If the profile option is set to No, the user can only select grade values from the defined list of values.

See: Assignment, *Oracle SSHR Deploy Self-Service Capability Guide*

This profile option is used in SSHR.

HR:Payroll Payments Self-Service Enable Multiple Assignments

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

This profile option is used in SSHR.

HR:Payroll Payments Self-Service Payments List Mode

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

HR: Performance View Layout

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

This profile option is used in SSHR.

HR:Personal Actions Menu

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

This profile option is used in SSHR.

HR: PL NI Unique Error or Warning

Controls whether HRMS generates an error or a warning for duplicate PESEL values at the legal-employer level. Valid values are Error, Warn, and None. Set to None if no validation is required.

See: HR: NI Unique Error or Warning, page 1-107

HR: Position Default Options for SSHR

These options control whether or not the application displays default information based on the position you select for an assignment. You can set one of four values:

- Default with No Warning
- Default with User Decision
- Default with Warning
- No Defaulting

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

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

This profile option is used in SSHR.

HR: Propagate Data Changes

Controls the synchronization of person records for an individual in multiple business groups.

To propagate changes made to a person record in one business group to records for the same person in all business groups, set this profile option to Yes.

> **Note:** You can propagate changes to only those business groups your security profile allows you to update.

HR:Purge Element Entry Permission

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

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

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

HR:Query Only Mode

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

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

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

> **Note:** You can set the parameter QUERY_ONLY=YES for a form function that also launches a task flow. In this case, specify two parameters in the Form Function window:
>
> QUERY_ONLY=YES
>
> WORKFLOW_NAME="*task flow name*"
>
> The entire task flow will be query-only, not just the first form.

See: Restricting Access to Query-Only Mode, page 1-132.

HR:Refresh Self Service Actions with Data from Intervening Actions

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

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

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

HR: Restrict Letter by Vacancy or Event

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

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

HR:Restrict Transactions across Legislations in SSHR

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

HR: RIA Integration Enabled

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

HR:Run BENMNGLE When Processing a Self Service Action

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

HR: Salary View Layout

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

This User Profile Option is used in SSHR.

HR: Save and Stay in Appraisals Page

Controls what happens when the user clicks Save as Draft in an SSHR Appraisals page. When this option is set to Yes, which is the default value, the user remains in the current page and can continue to edit the appraisal. When this option is set to No, the Appraisals home page appears.

HR: Schedule Based Absence Calculation

Set this profile option to Yes at the site level if you want the application to take into account the schedules and calendar events information from the worker's primary assignment to calculate the actual duration of an absence. The default is No. If you leave the default value for this profile, and have already created a basic formula for absence duration, the application calculates the absence duration on the basis of the absence start and end dates, without using the schedules and calendar events information.

HR: Security Profile

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

If you use Standard HRMS security you must set up the HR: Security Profile profile

option for each responsibility.

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

HR: Self Service HR Licensed

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

This profile option is used in SSHR.

HR:Self Service New Hire Default Values

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

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

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

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

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

This profile is used in SSHR.

HR:Self-Service Save for Later

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

HR: Servlet Timeout

If you are using Info Online to allow users to access information provider websites, use this profile to set the maximum time in seconds that the system waits for a response from the web server mediating the connection to the integration partner.

HR: SM Employee Find Work Opp Menu

Controls suitability-matching functions for finding a work opportunity available to employees using the Employee Self-Service responsibility.

HR: SM Manager Find Person Menu

Controls suitability-matching functions available to managers using the HR Professional or Manager Self-Service responsibility for finding a person for a work opportunity.

HR: SM Manager Find Work Opp Menu

Controls suitability-matching functions available to managers using the HR Professional or Manager Self-Service responsibility for finding a work opportunity for a person.

HR: Subrogation

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

HR: Supervisor Hierarchy Usage

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

HR: Training View Layout

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

This profile option is used in SSHR.

HR:TCA Unmerge Options

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

profile option to control how the unmerge process is run. Select one of the following options:

- **Pre Stage Process** If you select this option, then the TCA Unmerge process does not run during auto patch. Instead, you can log in as a System Administrator and submit the concurrent program Unmerge Contacts from TCA (HR TCA process) at a convenient time.

- **In Patch Process** If you select this option (which is the default option), then the HRMS component of the unmerge process is run during auto patch. A concurrent program is then submitted automatically during the auto patch process to run the TCA component of the process.

- **Deferred Process** If you select this option, then a concurrent program is submitted automatically during the auto patch process to run both the HRMS and TCA components of the process.

HR: US Address Line Length

This profile option, which specifies the maximum length of an address line, affects U.S. addresses only; it has no effect in other legislations. Oracle HRMS displays a warning message when you view or enter address lines longer than the value you specify here. The value of this profile option overrides any maximum address line length specified in the Personal Address Information descriptive flexfield for the current local U.S. address style.

HR: Use Fast Formula Based PTO Accruals

This user profile option is disabled.

HR: Use Global Applicant Numbering

Enables the global sequence for applicant-number generation. This sequence is shared among all business groups.

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

HR: Use Global Contingent Worker Numbering

Enables the global sequence for contingent-worker-number generation. This sequence is shared among all business groups.

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

HR: Use Global Employee Numbering

Enables the global sequence for employee-number generation. This sequence is shared among all business groups.

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

HR:Use Grade Defaults

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

This Profile Option is used in SSHR.

HR:Use Standard Attachments

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

HR:User Type

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

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

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

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

The windows that are dependent on the setting of this profile option are as follows:

Form	Profile Setting	Behavior
Define Element Classification (PAYWSDEC)	HR User	You cannot create secondary element classifications.

Form	Profile Setting	Behavior
Define Element Type (PAYWSDET)	HR User	Some payroll fields are not available.
Define Payroll (PAYWSDPG)	HR User	The Statutory Information field is not visible. **Note:** Statutory Information is not available at payroll level for all localizations, for example, it is not available for the UK.
Element Entries (PAYWSMEE)	HR User	The Processing Priority field in the Element Entry Values window is not available.
Define Assignment Status (PERWSDAS)	HR User	You cannot use the Payroll Status as a query criterion in Enter Query mode.
Define Benefit Contributions (PERWSEBC)	Payroll User	You cannot change the coverage type or contribution amounts for an existing benefit contributions record. You cannot create benefit contribution records.
SSP/SMP (SSPWSENT) (UK Only)	HR User	You must enter the average earnings amount for your employee before you can calculate their entitlement to statutory payments.
SSP/SMP (SSPWSENT) (UK Only)	Payroll User or HR with Payroll User	You can derive the average earnings automatically.
Employee Assignment (PERWSEMA)	HR User	Payroll field is display only.

Form	Profile Setting	Behavior
Employee Address and Define Location (US Federal Only)	HR User	The default address style is United States (International).
Employee Address and Define Location (US Federal Only)	Payroll User or HR with Payroll User	The default address style is United States.
Define Element Type (US Federal Only)	HR User	The application uses the predefined Federal element names.
Define Element Type (US Federal Only)	HR with Payroll User	The application uses the element names you define for the Federal elements.
Terminate (US Federal Only)	HR with Payroll User	You can update the Final Process Date.

HR: Use Title in Person's full name

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

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

HR: Verification External Node

Defines the URL for the external node for the Employment Verification function. The node redirects the access request from outside the security firewall to the HTML page containing the released employment information.

This profile option is used in SSHR.

HR: View Payslip From Date for WEB

Limits the number of pay periods an employee can view.

This profile option is used in SSHR.

HR: Views Layer Size

Enables you to set the width of the Employee Name and Employee Number floating

layer to the longest name and number you have.

This profile option is used in SSHR.

HR:View Unpublished Employee 360 Degree Self Appraisal

Enables a manager to view employees' unpublished 360 Degree appraisals. (This option does not affect self appraisals.) Set this option to Yes to view employees' unpublished 360 Degree appraisals. The default value is Null.

HR:Webapps Tips Test Mode

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

This User Profile Option is used in SSHR.

HR: Web Proxy Host

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

HR: Web Proxy Port

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

HR: Worker Appraisals Menu

Controls the types of appraisal a worker can initiate. The default value is Employee Appraisals Menu.

HRI: Collect Manager Snapshots

If you turn this profile option on, the DBI for HRMS collection process collects an additional summary layer for managers who have more staff than a specified number reporting to them. The default value is No. Use in conjunction with HRI: Manager Snapshot Threshold.

HRI: Collect Open Enrollment in Progress

Determines the enrollment data that DBI for HRMS collects. Set this profile option to Yes to collect data for the current open enrollment period. To collect historic data of enrollments along with the open enrollment data, set the profile option to No.

HRI:DBI Chief HR Officer Named User

Enables users of the Chief HR officer responsibility to access the Chief HR Officer dashboards effectively as the CEO of the enterprise.

Note: You must have successfully run an Initial Load before you set this profile option.

Select the name of the user from the profile option list. The list of managers shown for the profile is only those at level 1 (the top of the hierarchy). To turn this profile off, set the profile option value to No.

Note: This new profile option only affects the Chief HR Officer responsibility.

HRI:DBI Force Foundation HR Processes

Determines whether the HRI Collection Programs run in Foundation HR mode (on a Full HR Installation). The Foundation HR mode only collects data as of the system date; it does not maintain historical data. If you are an HRI DBI customer, you must set this profile option to No.

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.

HRI:DBI Link to Transaction System

Enables users of DBI for HRMS to drill from detail reports to employee records in the HR Self Service Employee Directory.

Set this profile option to HR Employee Directory to turn this feature on. The default value is Disable Link.

HRI:Enable Benefits Collections and Event Queue

Enables managers to view the life event statuses for participants in the open enrollment period. Set this profile option to display the life event statuses in the DBI for HRMS Enrollment Process Status report.

HRI:Enable Captured Events Archive

Controls the archive mode for the events capture process in DBI for HRMS. Set this option to Yes to archive all events that trigger incremental processing.

HRI:Enable Detailed Logging

Enables you to include a debug message in the concurrent manager log to troubleshoot errors during the HRI data collection process. Set the HRI:Enable Detailed Logging profile option to Yes. The default is No.

Caution: Only set this profile option to Yes if you encounter an error. Debugging the collection process impacts the collection timings.

HRI: Manager Snapshot Threshold

Determines the minimum number of staff required to enable snapshot collection for a manager. The default is 2500. Use this profile in conjunction with HRI: Collect Manager Snapshots.

HRI:Multithreading Chunk Size

Determines the number of objects processed at one time during the DBI for HRMS collection 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, as the default value is the result of benchmark tests. If you receive the error "Oracle exception: cannot extend rollback segment" during the collection process, then reduce the value for this profile option.

HRI:Number of Threads to Launch

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, then set this profile option to equal the THREADS parameter defined for PYUGEN. The default value for this parameter is 8.

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

HRI:Period of Service / Placement Date Start Source

Determines how DBI for HRMS calculates the employee's periods of service. The default value is Start Date. With this setting, DBI for HRMS calculates periods of service from the beginning of employees' current period of service.

To calculate the employee's period of service from the beginning of their first period of service, change the value to Adjusted Service Date.

Caution: HRMS also uses the Adjusted Service Date to calculate benefits. You must therefore consider the effect on benefits if you use this feature.

HRI:Populate Assignment Events Queue

Determines whether the events collection process in DBI for HRMS populates the

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

HRI:Populate Supervisor Hierarchy Events Queue

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

HRI:Populate Supervisor Status History Events Queue

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

HRI: Workforce in Period Calculation Method

Determines the calculation that DBI reports use in averaging values over a period, for example, workforce turnover or average employee absence. Select from:

- Workforce End: headcount at the end date of the reporting period.
- Workforce Start + End Average: average of the headcount at the start date and the headcount at the end date of the reporting period.

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

HZ: Protect HR Person Information

Controls the synchronization of common data between Oracle HRMS and Oracle Student System (OSS). By default (when this option is set to No) data synchronization is enabled.

Limit by Persons Organization

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

OAB:Self Registered User Responsibility

Identifies the responsibility to be granted to new users who successfully self-register in SSHR using the New User Registration processes. This profile option is seeded at site

level with the seeded responsibility *Self Registered Employee Default Responsibility*. You can set this profile at responsibility level if you have created several responsibilities for different groups of users to use after initial registration.

This profile option is used in SSHR.

OAB:Enable Self-Service Benefits Trace

This profile option enables to you to generate a PYUPIP trace file for a particular Self-Service Benefits user that you select. Use this profile option to debug Self-Service Benefits election problems.

This profile option is used in SSHR.

OAB:User to Organization Link

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

This profile option is used in SSHR.

OAB:User to Payroll Link

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

This profile option is used in SSHR.

PAY: Generate Periods for Tax Year

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

PAY:Statement of Earnings User Category

You use this profile when setting up a global statement of earnings to be viewed online. It enables you to select user category when setting up the global statement of earnings.

PER:Automatic Save

You use this profile when setting up iRecruitment. Set the profile option to Y to enable an automatic Save For Later operation when users navigate to a new web page.

PER:Navigation

You use this profile when setting up iRecruitment. Set the profile option to Y if you want the application to validate data on the current web page when users navigate to a new page (Next or Previous).

Personalize Self-Service Defn

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

This profile option is used in SSHR.

PO: Services Procurement Enabled

Controls the availability of purchase-order information from Oracle Services Procurement to Oracle HRMS. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, you must set this profile option to Yes.

Talent Management Source Type

Enables you to select a default value from the "PROFICIENCY_SOURCE" (Source of Proficiency Rating) user lookup. HRMS uses this value when updating a person's competency profile automatically after an appraisal.

Workforce Measurement Type

Determines how DBI for HRMS measures the size of your workforce. The application currently only supports the value of Headcount.

Menus, Functions, and Responsibilities

Responsibilities

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

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

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

Responsibility

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

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

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

- Standard HRMS Security

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

- Security Groups Enabled Security

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

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

- Access applicant, employee, and contingent worker records from two or more security profiles.
- Use more than one menu structure to view or make changes to the records they can access.
- Access records for more than one business group if you use Standard HRMS

security. For example, an enterprise with international operations may have a US-Based business group and a UK-Based business group. A few of your employees might need to access both.

The Oracle HRMS responsibilities available globally include:

- HR Manager: to access HR features only
- HRMS Manager: to access HR and Payroll features
- Super HRMS Manager: to access HR, Payroll, and Advanced Benefits features

> **Note:** You can access standard benefits features using the HR manager or HRMS manager responsibilities. Only use Super HRMS Manager if you have licensed Oracle Advanced Benefits.

Access Control Through Responsibility

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

- *Security profiles* determine the organizations, positions and payrolls whose applicant, employee and contingent worker records responsibility holders can access.
- *Business Groups* determine the set of records a user can access. Using Security Groups Enabled security you can enable one responsibility for many business groups. Using Standard HRMS security you must set up a new responsibility for each business group.
- *Menu structures* and functions control:
  - The particular *windows* and *functions* a responsibility holder can access

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

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

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

    > **Warning:** If you exclude a function from a responsibility, a user with the responsibility can no longer access the function from any menu assigned to the responsibility. However, the function may still be attached to a task flow. If this is the case, the user

will be able to access the excluded function when working through the task flow sequence. To avoid this situation, you may need to modify your task flows to remove the function.

See: Task Flow, page 3-139

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

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

- *Request groups* determine the group of *processes and reports* a responsibility holder can initiate. A request group is an optional component of a responsibility. If holders of a responsibility should not initiate any reports or processes, you do not include a request group in the responsibility.

- *Extra Information types* are an optional component of a responsibility. By defining which extra information types are included in a responsibility, you effectively create a configured version of a window for users who are assigned the responsibility.

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

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

Responsibility Ownership

If you are using Self-Service Human Resources (SSHR) you can use the Responsibility Ownership functionality to administer and control access to responsibilities by assigning an owner relationship. You can use the Responsibility Ownership functionality in SSHR to display a hierarchy of functions and menus attached to the responsibility and also display information on users of the responsibility. If appropriate, you can revoke access to a responsibility using the self-service interface.

See: Responsibility Ownership, *Oracle SSHR Deploy Self-Service Capability Guide*

Menu Structure

Users access standard windows, configured windows, and the first window in a task

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

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

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

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

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

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

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

The Default Menu Structure

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

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

- HR View Medical

  This causes the Medical Information tabbed region to display in the People window.

- HR View Background

This causes the Background Information tabbed region to display in the People window.

- HR View Benefits

  This causes the Benefits tabbed region to display in the People window.

- HR View Rehire

  This causes the Rehire Information tabbed region to display in the People window.

- Salary Administration: Approve

  This enables the user to approve salary proposals in the Salary Administration window and the Salary Management folder.

- HR View Projects Information

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

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

`Disable Multiform`

See: Disabling Multiple Windows, page 1-131

Request Groups

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

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

Structuring Menus

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

Caution: You should not modify the default functions and menus

supplied with the system. On upgrade, these defaults will be overwritten.

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

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

Structuring Menus:

1. Start by drawing it out on paper. This helps you to decide the best structure and the best prompts and descriptions.

2. Decide how to structure your menus. Menus can be structured in different ways:

   - Following a Sequence of Tasks.

     For example:

     1. Define a Requisition and Vacancy

     2. Define a Recruitment Activity

     3. Enter Applicant Information

   - By Type:

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

3. Work from the lowest level of sub-menu to the highest and define the root menu as the last step in the sequence.

4. Define as many submenus as you require under each menu option. We recommend that you restrict the number of menu levels to three because a menu structure with more levels is cumbersome to use.

Defining Menus

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

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

```
Disable Multiform
```

See: Disabling Multiple Windows, page 1-131

A number of predefined functions are not provided on the supplied menus. You can add them to your own menus. See: Menu Structure, page 1-127 for a list of these functions.

To define a menu:

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

   For example, select Salary Administration: Approve to enable users to approve salary proposals.
3. Save your changes.

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

Disabling Multiple Windows

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

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

To disable the Multiple Open Window feature:

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

Defining Menu Functions

Use the Form Functions window to define your menu functions.

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

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

Define Menu Functions:

1. Define your menu function using the Form Functions window.

   See: Form Functions Window, *Oracle Applications Developer's Guide*

2. When you have created your custom functions, add them to a menu.

   See: 'Menus Window, *Oracle Applications System Administrators Guide*

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

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

Restricting Access to Query-Only Mode

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

1. In the Form Functions window, select the form and specify the parameter QUERY_ONLY=YES. If you want to specify other parameters for this form function, separate them with a space.

2. Enter a user function name to identify your new function, and save it.

3. In the Menus window, select your new function instead of the supplied form function.

Using Parameters for HRMS Form Functions

To use parameters in Form Functions:

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

- If the menu entry calls a configured form, use the following parameter:

  HR_CUSTOMIZATION = "*customization name*"

- If the menu entry calls the first form in a task flow, use the following parameter:

  WORKFLOW_NAME = "*task flow name*"

- If the menu entry calls a form in query-only mode, use the following parameter:

  QUERY_ONLY=YES

- If the menu entry calls a people management template, use the following parameter:

  TEMPLATE_NAME="*name of your template*"

- If the menu entry calls the Define Rate form (PAYWSGEV), use the following parameter:

  FORM_MODE = "grade" (for the Grade Rate window)

  FORM_MODE = "spine" (for the Scale Rate window)

- If the menu entry calls the Payroll and Assignment Processes form (PAYWSACT - used in Oracle Payroll), use the following parameter:

  FORM_MODE = "assignment" (for the Assignment Processes window)

  FORM_MODE = "payroll" (for the Payroll Processes window)

- If the menu entry calls the Organization Manager Relationship form (PERWSCCM), use the following parameter to limit the list of organizations to those with a particular classification. You can find the organization classification code for a classification from the ORG_CLASS Lookup Type, for example the code for HR Organization is HR_ORG:

  RESTRICT_CLASSIFICATION = *"organization classification code"*

- If the menu entry calls the Enter Person window (PERWSEMP), you use the following parameter to hide sensitive data:

  HIDE_SENSITIVE_DATA = Y

- To prevent position users from attaching a position to an existing control budget and entering budget data, set the form function parameter DISABLE_BUDGETS="Y" for the Position window (HRWSPSF).

- The Position, Position Transaction, and Position Copy forms enable you to perform secondary queries when searching for positions, using a Combinations button. The Combinations button enables you to see positions across business groups. If you want to restrict the positions users can see to those within their own business

group, hide the Combinations button by setting the parameter SHOW_COMBINATIONS=N.

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

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

AuditTrail

AuditTrail Overview

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

Performing AuditTrail

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

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

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

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

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

Audit Information Reports

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

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

The system's audit report performs this additional processing. You can use it as supplied or as an example of how to report on audit information. It can report on both

datetracked and non-datetracked tables that have a numeric primary key.

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

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

- The date and time of the change
- The user ID who made the change
- The type of change
- The fields that changed and either their old values, or their new values, or both, depending on the type of change

Table of Transaction Types in the Audit Report

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

Type of Change	Field Values Shown in the Report
Normal Insert (creates a non-datetracked record)	The non-null values in the new record.
Normal Update (updates a non-datetracked record)	The old and new values for all fields that changed.
Normal Delete (deletes a non-datetracked record)	The non-null values in the record that was deleted.
DT First Insert (creates a datetracked record)	The non-null values in the new record.

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

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

Custom Audit Reports

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

Dynamic SQL Structure

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

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

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

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

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

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

HR Audit Tables

The HR_AUDITS table holds audit information about the transaction. The

HR_AUDIT_COLUMNS table holds the changed column information for that transaction.

HR_AUDITS Table

The following table shows the structure of the HR_AUDIT table:

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

HR_AUDIT_COLUMNS Table

The following table shows the structure of the HR_AUDIT_COLUMNS table:

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

Setting Up AuditTrail

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

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

To set up AuditTrail:

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

Using a System Administrator responsibility:

2. In the System Profile Values window, set the AuditTrail:Activate profile option to Yes at Site or Application level.

3. In the Audit Installations window, query the application(s) you want to audit, and check the Audit Enabled box next to the Oracle User Name.

4. In the Audit Groups window, query the application and enter a name for the audit group, then select the tables you want to audit (using the User Table name). For a new audit group, select Enable Requested in the Group State field.

5. In the Audit Tables window, query each table you want to audit, and select which columns in these tables you want to audit.

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

6. In the Submit Request window, run the AuditTrail Update Tables process. This process:

   - Creates database triggers on your audited tables
   - Creates one shadow table for each audited table, to contain the audit information
   - Builds special views on non-datetracked tables, which you can use to retrieve your audit data for reporting

Using an HR Manager responsibility:

7. In the Submit Request window, run the AuditTrail Update Datetracked Tables process. For each datetracked table, this process:

   - Creates an index on the shadow table
   - Creates the function *tablename*_TT and the procedure *tablename*_VP, which extracts information from the shadow table when you run the predefined audit report

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

Disabling AuditTrail

To disable AuditTrail:

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

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

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

Running the Predefined Audit Report

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

To run the predefined audit report:

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

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

2

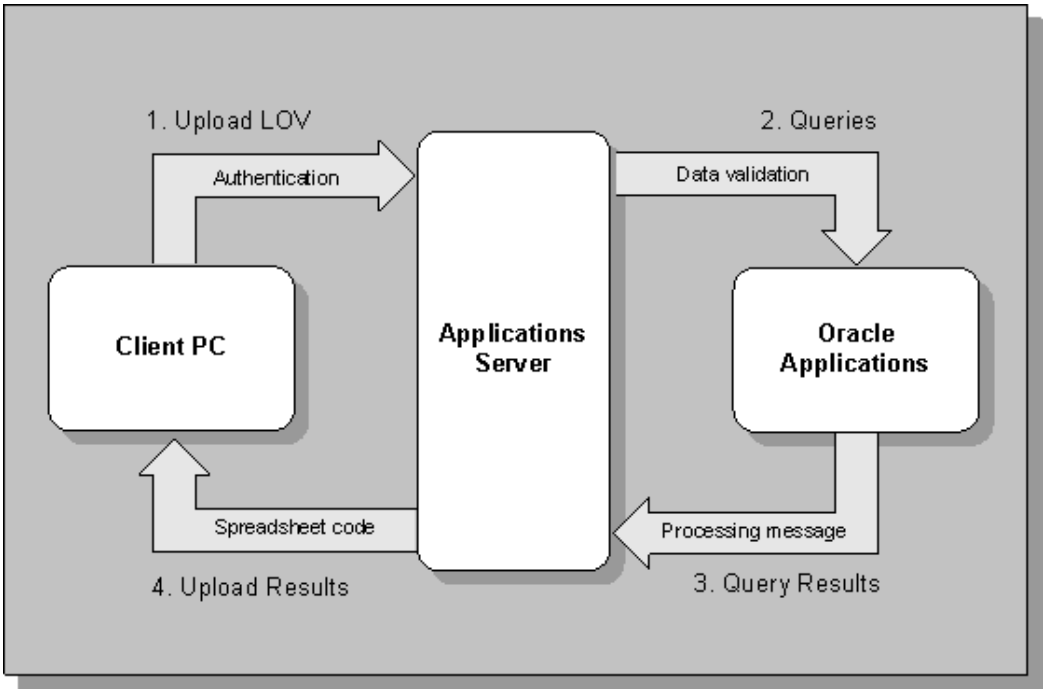
Desktop Integration

Desktop Integration Overview

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

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

How Web ADI works



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

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

See: Data Download and Upload using Web ADI, page 2-5

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

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

- Using word processors
- Using Oracle Reports

See: Concurrent Processing, page 2-38

Desktop Integration

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

Can you download data from a window in Oracle HRMS?

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

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

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

Can you upload data from legacy systems using Web ADI?

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

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

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

Can you create standard letters using data from Oracle HRMS?

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

Do you need a separate licence for Web ADI?

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

Can you reuse ADE information with Web ADI?

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

ADI.

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

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

What types of standard letter can you create?

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

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

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

Data Download and Upload Using Web ADI

Data Download and Upload Using Web ADI - Overview

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

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

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

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

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

Standard Oracle security is maintained.

Methods of Running Web ADI

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

You cannot invoke Web ADI from the People Management templates, nor the Self-Service HRMS (SSHR) pages, nor the following windows:

- Absence Detail
- Mass Update of Applicant Assignments
- Mass Update of Employee Assignments
- Mass Update of Assignments
- Position Copy
- Mass Position Update

In addition, you cannot invoke Web ADI from the Assignment window when you access it by task flow from the Person window.

Note: If you access the Assignment window by task flow from the Person window, you will not be able to invoke Web ADI from that Person window for the current person query. To restore Web ADI function, perform the query in the person form again.

You can invoke Web ADI from the Assignment window when you access it directly from the Navigator.

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

Integrators

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

When you create your spreadsheet or word processing document using Web ADI, you select an appropriate integrator, and Web ADI handles the transfer and validation of data accordingly.

Predefined Integrators

Oracle HRMS supplies some sample integrators that enable you to download data from the following windows and folders for reporting or analysis purposes:

Window or Folder	Integrator
People Window	HR People Details Integrator
People Folder	HR People Folder Detail Integrator
Assignment Window (accessed directly from the Navigator)	HR Assignment Detail Integrator
Assignments Folder	HR Assignment Folder Detail Integrator
Salary Management Folder	HR Update Salary Proposals Integrator

Using the HR Update Salary Proposals integrator, you can edit the downloaded data and upload it to HRMS. The remaining four sample integrators support data download

only.

> **Note:** These five predefined integrators demonstrate the supplied function but are not supported solutions, and you cannot create your own layouts for these integrators. However, you can create your own integrators to enable download and upload of HRMS data.
>
> See: Configuration of Data Download and Upload, page 2-13

Key Concepts

An understanding of the following terms may assist you in downloading and uploading data between Oracle HRMS and your desktop using Web ADI.

API

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

Content

When you create a spreadsheet or word processing document, the *layout* defines the columns that appear in the document and the content identifies the data in the document. Content is usually downloaded from the Oracle application database, so that the spreadsheet contains the data you have queried from a window in Oracle HRMS. You can also create a spreadsheet with no content, so that you can enter new data using the spreadsheet and upload it to the application. Another method is to bring in the content of the spreadsheet from a text file on your desktop. This enables you to upload the data from the text file to the application, for example to upload legacy data or information from third-party applications to Oracle HRMS.

Download

This is the process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

Integrator

An integrator defines all the information that you need to download or upload from a particular window or database view or for a particular purpose (the type of integrator determines the purpose for which you can use it). Your system administrator can set up the appropriate integrators depending on whether you want to download for reporting or mail merge purposes, or in order to manipulate the data and upload it again.

Interface

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa. In HRMS, interfaces can be views (for downloading data) or APIs (for uploading data). The integratorincludes all the columns that are available in the interface, whereas the *layout* specifies only those that the user needs to see.

Layout

A layout identifies the columns to appear in a spreadsheet or Word document. A single integrator can have multiple layouts for different purposes. If more than one layout is available for an integrator, you select a layout when you create a document. If only one layout is available, the application selects it for you automatically.

Mapping

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns. When Web ADI creates the spreadsheet, it ignores any columns from the text file not included in the mapping.

Template Letter

This is a form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

Upload

This is the process of transferring the data from a spreadsheet on your desktop back to the Oracle HRMS application, overwriting the existing data in the application database. This process can take place only if Web ADI created the spreadsheet.

View

A view is an example of an interface that you can use to download data from the application to a spreadsheet. The integrator definition includes the name of the view. Views to access many windows are already available with Oracle HRMS. System administrators can create additional views if necessary.

Viewer

A viewer is a desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS.

Data Download Using Web ADI

You can download data from your Oracle HRMS application to a spreadsheet or word processor on your desktop. You can then use the features of your spreadsheet or word processing tool to manipulate data for analysis and reporting purposes.

You can download from within a window in the HRMS Professional User Interface (including OLM windows), or directly from a Web ADI self-service page.

You can save the spreadsheet that you have created and return to it later. The spreadsheet includes all the data you have downloaded. You can refresh the data without creating a new spreadsheet by carrying out a new download directly from the spreadsheet, without recreating the spreadsheet.

See: Data Upload Using Web ADI, page 2-10 and Letter Generation Using Web ADI, page 2-10

Downloading from an HRMS Window

This method enables you to use the query you enter in the window to specify the records to download.

Downloading from a Self Service menu Function

This method enables you to apply values at runtime so that you can specify the records to download.

Downloading an Empty Spreadsheet

You can download an empty spreadsheet from the ADI web page (that is, containing the columns you want, but no data), and then use the spreadsheet to enter new data.

Downloading an Empty Spreadsheet and Incorporating Data from a Text File

You can download the structure of your spreadsheet using Web ADI, but instead of downloading the content of the spreadsheet from the applications database, you can incorporate a text file in the spreadsheet as you create it, and then upload the data from the text file to the database. See: Data Upload Using Web ADI, page 2-10

Format of Text files

Text files must be in delimited format, separated by commas or other standard characters. You can use text files that include or exclude headings in the first line.

Data Upload Using Web ADI

You can use Web ADI to upload data that you have previously downloaded to a spreadsheet, or data that you have entered in an empty spreadsheet. You can do this only if the spreadsheet was created using an upload integrator.

Features of Data Upload

You can only upload data using an integrator that has been created for this purpose (for example, the HR Update Salary Proposals integrator available from the Salary Management folder). You must specify at the time you download the data that you intend to upload it again, by unchecking the Reporting check box. You must also have access to a responsibility that gives you access rights to upload data as well as download it.

Data to be uploaded is validated before the upload occurs. You must ensure that you enter values in all mandatory fields, so that validation is successful when the data is uploaded to the application. If you do not, the data is not uploaded, and an error message appears in the Messages column in the spreadsheet for the record with the invalid data.

For example, if you are using the HR Update Salary Proposals integrator, you must enter values in the Proposed_salary and Change_date fields, as a minimum, for any row you want to upload. If your organization has created its own integrators for uploading data, your system administrator can tell you which fields you must enter.

When you change any field in the spreadsheet, the row is flagged for upload. By default, only flagged rows are uploaded. You can change this setting so that all rows are uploaded.

Letter Generation Using Web ADI

You can generate mail merge letters from Oracle HRMS using Web ADI.

Web ADI retrieves the data and downloads it directly into a template letter (which you can also store in the Oracle applications database) to form the mail merge.

When you create a document for a mail merge, ensure that you select Word as the viewer, and check the Reporting check box.

Your system administrator must set up integrators to enable the letter generation to take place.

In addition, the layout associated with the letter generation process must have the same name as the letter created in the Letter window in the Oracle HRMS application. This associates a letter with an assignment status in Oracle HRMS or an enrollment status in OLM, and links the letter to the layout.

Implementing Web ADI for use with Oracle HRMS

The following implementation steps are required to implement Web ADI for use with Oracle HRMS.

See also the *Oracle Web Applications Desktop Integrator Implementation and Administration Guide*.

HR: Enable Web ADI Integration Profile Option

In the System Profile Values window, the HR: Enable Web ADI Integration profile option default is Yes. The Web ADI pages open when you choose the Export Data icon on the toolbar of an HRMS window.

To use Application Data Exchange (ADE) instead of Web ADI, change this profile option to No at Site level. This change enables the Export Data icon to launch Application Data Exchange (ADE) software.

Web ADI Menu Options

1. The supplied Web ADI responsibility and self-service menu give access to the following menu options:

   - Create Document
   - Define Layout
   - Define Mapping
   - Manage Document Links

   Give users access to this responsibility, or attach this menu to their responsibility, if they need to access Web ADI from the self-service menu (without going through one of the HRMS application windows), or if they need to define layouts or mappings, or create links between template letters and layouts.

   See the *Oracle Web Applications Desktop Integrator Implementation and Administration Guide* for further details about this menu.

2. A self-service menu "HRMS ADI Document Manager Menu", is supplied for use with Web ADI. This contains the Document Management menu option and required functions. Add this menu to the main menu attached to the responsibilities of any users who need access to the Document Management features.

3. The supplied function "Web ADI Create Document" gives access to Web ADI from any HRMS window.

Important: You must add this function to the main menu attached to the responsibilities of any users who need access to Web ADI from an HRMS application window.

4. The Create Document menu option on the Web ADI menu includes integrators for all applications. An alternative self-service menu, "HRMS ADI Create Document menu" is supplied, containing the menu option "HRMS Create Document". This restricts the list of integrators to HRMS application integrators that are not launched from a window (that is, where the FORM_NAME parameter for the integrator is "GENERAL").

   If you create your own "GENERAL" integrators, you need to change the parameters of this function from:

   - &bne:integrator=800:GENERAL%25

   to:

   - &bne:integrator=800:GENERAL%25,999:GENERAL%25

   replacing 999 with your own Application ID.

5. If only one option is available in Web ADI, the page automatically defaults the option. If all the options on a screen are defaulted, the page is skipped, so that the end user does not have to fill them in. The user only sees the final 'Review' page. To remove the Review page that appears at the end of the Web ADI wizard, edit the "HRMS Create Document" or "Web ADI Create Document" function, and change the parameters of the function, by appending:

   - &bne:noreview=true

6. To restrict users to carrying out download-only operations, edit the "HRMS Create Document" or "Web ADI Create Document" function, and change the parameters of the function, by appending:

   - &bne:reporting=Y

7. Integrators provided by HRMS for setup purposes may be grouped by creating a function similar to the "HRMS Create Document" by changing the following:

   - &bne:integrator=800:GENERAL%25

     to

   - &bne:intergator=800:HR_SETUP%25

     This function may be added to menus for users with privileges to create and edit integrators.

Configuration of Data Download and Upload Using Web ADI

You can create integrators to download and upload data from Oracle HRMS windows or directly from Web ADI, create merge letters, and upload data from text files.

Views for Web ADI

Depending on the information you want to download, you may need to create new views for use with Web ADI. You can use existing HRMS views, if appropriate.

To identify a view used by a window in Oracle HRMS, display a record in the window, and select Help > Diagnostics > Examine from the menu. In the Examine Field and Variable Values dialog box, select SYSTEM in the Block list of values and LAST_QUERY in the Field list of values. Scroll through the SQL query that appears in the Value field to obtain the view name.

> **Note:** If you define a new view for downloading data from a form, the new view must include at least the same columns as the view used by the form. This restriction is necessary because the integrator uses the query you use in the window to restrict the data. If the query restricts on columns that do not appear in your view, the query fails.

APIs for Web ADI

The seeded HR Update Salary Proposals integrator, available from the Salary Management folder, uses the HR_UPLOAD_PROPOSAL_API.

The details of APIs that you can use for uploading data are available in the Oracle Integration Repository. See: Oracle Integration Repository Overview, *Oracle Integration Repository User Guide* .

> **Note:** HRMS APIs use IDs in their parameters rather than user-friendly data. Therefore, when you define Upload or Update Integrators, write wrapper packages to convert or preprocess the data before calling the APIs.

Integrators for Web ADI

To enable users to download, create merge letters, or upload newly created or updated data, either from within an HRMS window or direct from Web ADI, you need to create integrators of the appropriate types.

To create new integrators, you use the Create Document menu option in Web ADI to create an empty spreadsheet containing all the columns you need to fill in to create an integrator. Oracle supplies an integrator for this purpose: the "HR Integrator Setup"

integrator. You then enter the relevant data into the spreadsheet and upload it to the database.

You can apply a restriction to a standalone integrator using the "HR Create Standalone Query" integrator, and you can update a runtime restriction using the "HR Maintain Standalone Query" integrator.

You can disable Integrators using the HR Disable Integrator integrator.

> **Note:** This integrator does not disable integrators created for the HRMS Application which are delivered with the application. Therefore, if you create your own integrator, you should specify your own custom application name when creating the new integrator, so that you can disable it if required.

So that your users can easily identify the integrator they need to use, use a standard naming convention for the integrators. For example, names could begin with HR, include the name of the window or a clear indication of the type of information they contain, and indicate whether they are for download only, download and upload, or letter generation.

For information about defining standalone queries, see: Defining Standalone Integrator Queries, page 2-24

For information about maintaining standalone queries, see: Maintaining Standalone Queries, page 2-25

For information about disabling queries, see: Disabling Standalone Integrator Queries, page 2-26

Layouts for Web ADI

To use the integrator, you must set up at least one layout. If there is more than one layout, users must choose one. Ensure that the layout contains all mandatory fields and any other fields the user will need.

You should ensure that the name of the layout gives a clear indication of its purpose.

Additional Information

For information about setting up and configuring Web ADI, see the *Oracle Web Applications Desktop Integrator Implementation and Administration Guide* .

Controlling Access to HRMS Web ADI Integrators

You control access to HRMS Web ADI integrators using standard system-administration form functions and menus.

Controlling Access to Predefined Integrators

HRMS provides form functions for the predefined integrators. HRMS also automatically adds the form functions for some predefined integrators to the seeded menus from which they are accessed. The menus HR ADI Seeded Integrator Form Functions and HR ADI Skills Seeded Integrator Form Functions include the remaining form functions for predefined integrators. You can add these form functions to menus simply by adding the seeded menus HR ADI Seeded Integrator Form Functions and HR ADI Skills Seeded Integrator Form Functions (without the prompts) to any menu you use to access them. Alternatively, you can modify copies of the seeded menus and add them to existing menus, or you can add selected Web ADI functions directly to existing menus.

If you fail to add the predefined form functions to menus, the message "You do not have permission to access this functionality" appears when you select an integrator.

The following table shows the predefined integrators and their associated form functions in menu HR ADI Seeded Integrator Form Functions (HR_ADI_CAG_FORM_FUNCTIONS):

Predefined Integrator	Form Function (Internal Name)	Form Function (User Name)
HR Assignment Detail	HR_ADI_CAG_ASG_DETAIL	HR Assignment Detail Integrator
HR Assignment Folder Detail	HR_ADI_CAG_ASG_FOLDER	HR Assignment Folder Integrator
HR People Details	HR_ADI_CAG_PEOPLE_DETAILS	HR People Details Integrator
HR People Folder Detail	HR_ADI_CAG_PEOPLE_FOLDER	HR People Folder Detail Integrator
HR Update Salary Proposals	HR_ADI_CAG_UPD_SAL_PROP	HR Update Salary Proposals Integrator
HR Create Standalone Query	HR_ADI_CAG_SETUP_CREATE_QRY	HR Create Standalone Query Integrator
HR Disable Integrator	HR_ADI_CAG_SETUP_DISABLE	HR Disable Integrator

Predefined Integrator	Form Function (Internal Name)	Form Function (User Name)
HR Create Integrator Responsibility Restrictions	HR_ADI_CAG_SETUP_INTG_RESP	HR Create Integrator Responsibility Restrictions
HR Maintain Standalone Query	HR_ADI_CAG_SETUP_MAINTAIN_QRY	HR Maintain Standalone Query Integrator
HR Maintain Integrator Form Function Associations	HR_ADI_CAG_SETUP_MAINT_FUNC	HR Maintain Integrator Form Functions
HR Maintain Integrator Responsibility Restrictions	HR_ADI_CAG_SETUP_MAINT_RESP	HR Maintain Integrator Responsibility Restrictions
HR Integrator Setup	HR_ADI_CAG_SETUP_SETUP	HR Integrator Setup
Web ADI - Interface Columns Integrator	HR_ADI_CAG_INTERFACE_COLS	Web ADI - Interface Columns Integrator

The following table shows the predefined integrators and their associated form functions in menu HR ADI Skills Seeded Integrator Form Functions (HR_ADI_SKILLS_FORM_FUNCTIONS):

Predefined Integrator	Form Function (Internal Name)	Form Function (User Name)
Upload Third Party Rating Scale	HR_ADI_SKILLS_RSC	HR Upload Third Party Rating Scale
Upload Third Party Rating Level	HR_ADI_SKILLS_RTL	HR Upload Third Party Rating Level
Upload Third Party Competence	HR_ADI_SKILLS_CPN	HR Upload Third Party
Step 1: Upload Third Party Rating Scale	HR_ADI_SKILLS_STEP1_RSC	HR Upload Third Party Step 1
Step 2: Upload Third Party Rating Level	HR_ADI_SKILLS_STEP2_RTL	HR Upload Third Party Step 2

Predefined Integrator	Form Function (Internal Name)	Form Function (User Name)
Step 3: Upload Third Party Competence	HR_ADI_SKILLS_STEP3_CPN	HR Upload Third Party Step 3

Controlling Access to Custom Integrators

Custom integrators, like predefined integrators, must be associated with form functions. Therefore, for custom integrators you must:

1. Define at least one form function.
2. Add the form function to appropriate menus.
3. Associate the form function with one or more integrators using the HR Maintain Integrator Form Function Associations Integrator.

For detailed instructions for Step 3, see Controlling Integrator Access, page 2-26

Note that the form function HR Maintain Integrator Form Functions Integrator must be accessible from your menu before you can use the HR Maintain Integrator Form Function Associations integrator. You can associate:

- One custom integrator with one form function
- One custom integrator with many form functions
- Many custom integrators with one form function

Grouping custom integrators by form function improves integrator administration and gives you finer control over user access. For example, you can:

- Associate related integrators with a single form function, then add that form function to the menus of authorized users.
- Associate download integrators with one form function and upload integrators with a different form function to provide a restricted level of access to some users.
- Define a form function for each integrator, create a menu for each group of related integrators, and add those menus of functions to users' menus, as appropriate.

Controlling Access to Integrators Using Responsibilities

You can restrict access to integrators by responsibility using the HR Create Integrator Responsibility Restriction integrator. If you create a restriction for an integrator, only

users who have access via the responsibility can access the integrator. You can link integrators to multiple responsibilities. The restriction applies only when you launch Web ADI from the Professional User Interface (PUI) window.

You can update or remove the restriction using the HR Maintain Integrator Responsibility Restrictions integrator.

> **Note:** Oracle recommends that you control access to integrators using the form functions and menus instead of responsibility restrictions. Use of form functions and menus provides a greater degree of control over user access.

For information about restricting integrators by responsibility, see: Controlling Integrator Access, page 2-26

Upgrade Information for Converting from ADE to Web ADI

This section provides information about upgrading to Web ADI for customers who are currently using Application Data Exchange (ADE) to transfer information between Oracle HRMS applications and desktop tools.

Comparison of Features in ADE and Web ADI

For details of the features available in Web ADI, see: Data Download and Upload Using Web ADI: Overview, page 2-5

The method of operation of Web ADI is different from that of ADE, and terms used in ADE do not always have an exact equivalent. The following table lists terms used in ADE and the equivalent functionality in Web ADI.

Table of ADE and Web ADI Terminology

ADE	Web ADI
Style	Integrator
Style columns (columns set as displayed)	Layout
View name	Content
Style columns (queried from view)	Content columns
API name	Interface

ADE	Web ADI
Style columns (making up API parameters)	Interface columns
Style columns (that are view columns and API parameters)	Mapping
Style - Form Name	HR Integrator Setup - FORM_NAME parameter
Style - Letter Name	Layout Name (for Letter Request integrators)

Note: Customers converting from older versions of Oracle HRMS and ADE, in which ADE included hierarchy diagrammers, should note that the hierarchy diagrammers functionality is now available from standard windows in the HRMS Professional User Interface.

Additional Features in Web ADI

The following additional features are available in Web ADI:

- In addition to the ability to upload data that you have previously downloaded from a spreadsheet to the Oracle application database, Web ADI enables you to upload new data from legacy systems.
- Web ADI enables you to store your mail merge template letters in the Oracle application database

Prerequisites for Upgrading from ADE to Web ADI

The following information may assist you when upgrading from ADE to Web ADI.

Views

When creating new integrators for use with Web ADI, you may need to create a suitable view. If you have views that you have created for use with ADE, you can reuse these views.

Styles

You can convert existing styles in ADE to Integrators in Web ADI. See: Converting ADE styles to Web ADI Integrators, page 2-36

The conversion process uses the Upgrade from ADE to Web ADI concurrent process.

This process is available in the Global SHRMS Reports & Processes request group, attached to the Global Super HRMS Manager responsibility.

Profile Option HR: Data Exchange Directory

Information about ADE styles is stored in an ADE.INI file located on either individual user desktops or a shared drive. The Upgrade from ADE to Web ADI concurrent process uses this file to convert ADE styles to Web ADI integrators.

To use this concurrent process, you need to copy the ADE.INI file to a directory accessible to the Oracle database. The path to this directory must be within the UTL_FILE_DIR setting for your database and must be specified on the HR: Data Exchange Directory profile option.

Downloading Data to your Desktop using Web ADI

You can download data from Oracle HRMS to a spreadsheet or word processor using Web ADI, either from within a window in the HRMS application, or directly from a Web ADI page without accessing HRMS.

See: Data Download Using Web ADI, page 2-9

To download data to a document from an HRMS window:

1. Navigate to the window from which you want to download the data, for example, the People window.

2. Enter a query to return the records you want to download.

3. Choose the Export Data icon on the toolbar. The Settings page of the Web ADI wizard appears.

   Caution: When moving between Web ADI pages, do not use your browser's Back or Forward buttons, as this causes information to be lost; instead, use the Back, Next and Cancel buttons displayed on the Web ADI page.

4. Select the viewer you want to use to display the document. If you intend to edit the data and upload it again, select a spreadsheet viewer. If several different versions of a viewer are available, your system administrator can tell you which version is appropriate.

5. Select the Reporting check box if you are downloading data for reporting or letter generation purposes. If you want to edit the data in the spreadsheet and upload it to the application again, leave this box blank. You cannot upload data if the Reporting check box is selected when you download the data.

Note: You can only upload data using an integrator that has been set up to allow upload. Check with your system administrator to ensure that an appropriate integrator is available.

6. If more than one integrator is available for the HRMS window from which you ran the query, the Integrator page appears. Select an integrator.

7. If more than one layout is available, the Layout page appears. Select the appropriate layout.

8. All other information is defaulted, and a Review page displays technical details of the document that will be created. Choose the Create Document button to continue.

9. A spreadsheet or word processing document is created and displayed using the viewer you selected, and the data from the records you queried is added to the spreadsheet. Confirmation messages appear as the document is created.

   The data downloaded to the document depends on the query you entered in the window and the columns in your layout.

   Note: You may want to save the spreadsheet on your desktop at this stage, as otherwise the spreadsheet and the data it contains will be lost from your desktop when you close the spreadsheet (the data remains in the Oracle application).

To use integrators from the Web ADI self-service menu:

You can download application data to an existing spreadsheet, or download a spreadsheet layout.

Caution: To move within the application, use the application's Back, Next, and Cancel buttons only.

1. Select Create Document from the Web ADI self-service menu. The Settings page of the Web ADI wizard appears.

2. Select a viewer to display the document. If you want to upload data, then select a spreadsheet viewer. If several different versions of a viewer are available, ask your system administrator which version to use.

3. If you want to upload data, deselect the Reporting check box.

   Note: You can only upload data using an integrator that allows

uploads. Check with your system administrator to ensure that an appropriate integrator is available.

4. In the Integrator page, select an integrator from the list.

5. In the Layout page, select the appropriate layout.

6. In the Content page, select None to create a spreadsheet layout only, if you are not downloading data from the database to the spreadsheet. Select the default content to download data from the database.

7. In the Mapping page, to download data from a text file, select the location of the source text file and the delimiter type, and indicate the row at which to start transferring data. If your text file has header rows, start from row 2; otherwise, use row 1.

   The Mapping page also shows you the runtime restriction applicable for your integrator. You can enter appropriate values here to restrict your query.

8. In the Review page, review the full details of the new document. Choose the Back button to change any of the information, or choose the Create Document button to continue.

9. The new document displays in the selected viewer you selected. Confirmation messages appear during this process.

10. Save the spreadsheet on your desktop.

    See: Uploading Data Using Web ADI, page 2-22

Uploading Data using Web ADI

You can upload data to the Oracle applications database using a spreadsheet created in Web ADI. See: Data Upload Using Web ADI, page 2-10

To upload data from a spreadsheet using Web ADI:

1. If you have saved the spreadsheet on your local PC, locate and open the spreadsheet in Excel.

2. In the **Upl** column of the spreadsheet, each row in which you have changed data in any field is flagged for upload. As you change data in a field, the row is flagged for upload.

3. Select the Oracle menu on the Excel toolbar, and choose Upload.

4. If you are not already logged in to Oracle applications, a login page appears. Enter your user name and password, then choose the Login button.

5. In the Set Responsibility page, choose your responsibility, and then choose Select.

6. In the Upload Parameters page, choose the Parameters button. If you want to upload flagged rows only, choose the Flagged Rows option button. To upload all rows (for example, if uploading from a text file), choose the All Rows option button.

7. Choose the Proceed to Upload button, then choose the Upload button in the page that appears next. The upload takes place, and a series of upload messages is displayed, indicating the success or failure of the upload.

8. If the upload fails, return to the spreadsheet and correct any errors, then retry the upload. Further details of errors are available in the Messages column at the end of each row of the spreadsheet. If the upload is successful, the data is uploaded to the database. Confirmation messages indicate the success of the upload.

   Note: Web ADI uploads all rows to the database if the data is error-free. If any errors occur, no rows are uploaded.

Uploading Data from Legacy Systems using Web ADI

Follow these steps to upload legacy data to your Oracle HRMS applications database using Web ADI.

To upload data from legacy systems using Web ADI:

System Administrator steps

1. Set up an integrator that enables both download and upload. See: Creating Integrators in Web ADI, page 2-33

2. Define one or more layouts for the integrator. See: Defining Layouts in Web ADI, page 2-35. Ensure that the layout contains all the mandatory fields you will need to create a valid record.

   System Administrator or end-user steps

3. Ensure that the data to be transferred to the spreadsheet is in a text file in the appropriate format (see: Format of Text Files, page 2-9 for further details of file formats). Place the file in any directory you can access directly from your PC.

4. Define mappings between the columns in your text file and columns in the database. See: Defining Mappings in Web ADI, page 2-28

   End-user steps

5. Download the empty spreadsheet. See: To create an empty spreadsheet using Web ADI, page 2-21

6. Check that the data has transferred correctly to the spreadsheet.

7. Upload the spreadsheet to the database, ensuring that you select the All Rows option button in the Parameters page. See: Uploading Data Using Web ADI, page 2-22

Defining Standalone Integrator Queries

To define a new query, you must use an existing standalone integrator.

To define a new query:

1. Select Create Document from the Web ADI menu.

2. Select a spreadsheet viewer. Leave the reporting box unchecked to download data.

3. Select HR Create Standalone Query integrator.

4. Select the default options for layout and content.

5. Specify the application short name that you used, when you created the standalone integrator, in the mapping window.

6. Specify the integrator username, if required.

7. Review the data entered in the review window, and select the Create Document button.

8. Specify the query restriction to use for your integrator in the SQL WHERE clause column.

   Enter the SQL WHERE clause in the following format:

   ```
   WHERE COL_NAME
   LIKE $PARAM$.app:COL_NAME
   ```

   col_name = any column in the view used by the integrator

   app = application shortname

   You can use any SQL conditional operator in the SQL WHERE clause. For example:

   ```
   WHERE first_name
   LIKE $PARAM$.per:first_name
   ```

   Each instance of $PARAM$ is a bind variable, and you can use a maximum of 5 within a single WHERE clause.

9. Specify the name for each bind variable in the application parameter name column. For example: per:first_name.

10. Specify the type for each bind variable in the appropriate parameter type columns. For example: Varchar2. You can use the list of values to display the available options.

11. Specify the prompts for each bind variable. These prompts appear when you use the integrator (for example: first_name LIKE).

12. Upload your spreadsheet data to the database. Your integrator is now ready to use.

Using your integrator:

1. Select Create Document from the Web ADI menu.

2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.

3. Select the standalone integrator you created earlier.

4. Select the default options for layout and content.

5. Enter values for each prompt for every bind variable that you defined in the mapping window. You can also change the session date, if required, to ensure that you obtain the latest data for your query.

6. Review the data entered in the review window, and select the Create Document button.

7. View your results in the displayed spreadsheet.

Maintaining Standalone Integrator Queries

When you have finished defining a standalone query you can use the HR Maintain Standalone Query integrator to update the query.

Using the Maintain Standalone Query integrator:

1. Select Create Document from the Web ADI menu.

2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.

3. Select HR Maintain Standalone Query Integrator.

4. Select the default options for layout and content.

5. Enter the application short name, and optionally enter the integrator username.

6. Review the data entered in the review window, and select the Create Document button.

7. Modify the details in the displayed spreadsheet. Upload your changes.

Disabling Standalone Integrator Queries

You can use the HR Disable Standalone integrator to remove access to an integrator.

1. Select Create Document from the Web ADI menu.

2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.

3. Select HR Disable Integrator integrator.

4. Select the default options for layout and content.

5. Enter the application short name.

6. Review the data entered in the review window, and select the Create Document button.

7. Select the integrator from the list displayed, and change the value in the Disable column to Yes.

8. Upload your changes.

Controlling Integrator Access

You now control access to integrators using form functions and menus. Before associating the form functions with integrators you need to define your form functions and menus.

> **Note:** When you define your form function select Subfunction in the Type field.

Associating Form Functions with Integrators:

1. Select Create Document from the Web ADI menu.

2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data for updating.

3. Select HR Maintain Integrator Form Functions Integrator.

4. Enter the Application Short Name (for example, your custom application name). Optionally, enter the integrator name.

5. The displayed spreadsheet shows your selected custom integrators, and has a column for associating form functions. Enter the form function required for controlling access to the integrator.

   Note: You can add additional form functions to the same integrator using the comma as a delimiter.

6. Upload your changes.

Defining responsibility restrictions:

Note: Oracle recommends that you control access to integrators using the form functions and menus instead of responsibility restrictions. Use of form functions and menus provides a greater degree of control over user access.

1. Select Create Document from the Web ADI menu.

2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.

3. Select HR Create Integrator Responsibility Restrictions Integrator.

4. Select the default options for layout and content.

5. Review the data entered in the review window, and select the Create Document button.

6. Select Integrator Application Shortname from the list of values.

7. Select the Integrator User Name from the list of values.

8. Select your Responsibility Application Shortname from the list of values.

9. Select the responsibility name from the list of values.

   Note: The responsibility you select must be applicable to the responsibility/application short name.

10. Upload your changes.

Maintaining Responsibility Restrictions:

You can update or remove any restrictions you created for your integrators using the HR Maintain Integrator Responsibility Restrictions integrator.

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.
3. Select HR Maintain Integrator Responsibility Restrictions Integrator.
4. Select the default options for layout and content.
5. Enter the Application Shortname from the list of values, and optionally enter the integrator username.
6. Review the data entered in the review window, and select the Create Document button.
7. Update the Responsibility/Application Short Name and Responsibility Name columns in your spreadsheet. You can remove the values in these two columns to remove any restrictions.
8. Upload your changes.

Defining Mappings in Web ADI

You need to define mappings if you want to transfer data from a text file to a spreadsheet generated by Web ADI in order to upload it to the Oracle application database.

Define Mappings:

1. Choose Define Mapping from the Web ADI menu.
2. Select the integrator for which you want to create mappings.
3. Choose the Define Mappings button.
4. Enter a unique name for the mapping. Ensure that it clearly indicates the purpose of the mapping. For example, include the name of the text file and the API.
5. Enter a unique key. The key can contain only uppercase English characters, numerals, or the underscore character (_). The Web ADI application uses this key to

identify the mapping.

6. If you are mapping from a text file, enter the number of columns you want to map. This does not have to be the same as the number of columns in the text file or the API. However, only those columns mapped are transferred from the text file.

7. In the Define Mapping page, select a column from the text file in the source column and a column from the API in the target column that you want to map it to.

   Note: The columns you use to map the text file are *not* read directly from the text file, but are simply numbered columns from 1 to the number you specified in Step 6. To create the mapping, look at the text file and enter the number of the column you want to map to the API column.

8. When you have finished mapping, choose Apply.

Creating Mail Merge Letters using Web ADI

Follow these steps to create mail merge letters by downloading data from the Request Letters window using Web ADI.

To create mail merge letters:

System Administrator steps

1. If necessary, create a new view to retrieve data for the standard letter.

   Note: Any views you use for letter requests must join to the PER_LETTER_REQUEST_LINES table, and must include the column LETTER_REQUEST_ID. For example, the following view returns a person's first and last names following a letter request:

```
create or replace view hrv_people_letters as
  select
    letter_request_id,
    last_name,
    first_name
  from
    per_letter_request_lines plrl,
    per_people_f pp
  where
pp.person_id = plrl.person_id
/
```

2. Create an integrator. Ensure that you create the integrator with a METADATA_TYPE of DOWNLOAD, and enter LETTER in the FORM_NAME column. See: Creating an Integrator in Web ADI, page 2-33

System Administrator or end-user steps

3. Define an integrator layout that includes all the columns you may want to include as fields in the standard letter. See: Defining a Layout in Web ADI, page 2-35

4. In the Letter window in Oracle HRMS, define a letter by entering a name and selecting assignment or enrollment statuses to associate with the letter.

   See: To define a Standard Letter type, page 2-54

   > **Important:** The name you enter for the letter in this window *must* be the same as the name of the layout you created in Step 3.

   You must select a concurrent program before you can save the letter type in this window, but you can select any concurrent program as this information is not used by Web ADI.

5. In the Request Letter window in Oracle HRMS, select the letter name and define a letter request, then save your work.

   See: Requesting Letters, page 2-55

6. To create a data source for the creation of the template letter, click the Export Data icon on the toolbar in the Request Letter window, and then download the data, selecting Word as the viewer. See: To download data to a document from an HRMS window, page 2-20

   The application creates a simple Excel spreadsheet (even though you selected Word as the viewer) containing a column for each column in the integrator layout defined in Step 3.

7. Save the Excel spreadsheet to a temporary directory.

8. Create the template letter in Word using the file you saved in Step 7 as your data source, so that you can select any required fields to include in the letter. Save the template letter to a temporary directory.

9. Upload the template Word document to the database. See: Managing Template Letters Using Web ADI, page 2-31

10. Use the Manage Layout Document Links page to create a link between the integrator and layout and the template letter. See: Creating Links between Template Letters and Layouts, page 2-32

11. Delete the temporary files you created in Steps 7 and 8 when you have uploaded the template to the database.

    End-user steps

12. To create the Merge letter, in the Request Letter window, select a letter name, click the Export Data icon on the toolbar, and download the data, selecting Word as the viewer. This time, as the template linked to the integrator and layout is available in the database, the data automatically creates a merge letter. See: To download data to a document from an HRMS window, page 2-20

13. Save the mail merge letter to your local PC if required.

Managing Template Letters Using Web ADI

You can upload template letters to the Oracle applications database, making them available for use by anyone creating a mail merge letter. You can also overwrite an existing template letter with an updated version, and delete unused letters from the database.

To Upload Template Letters:

1. Select Document Management from the Web ADI menu. The Document Management page appears.

2. Choose the Upload New Document button. The Upload New Document page appears.

3. Select the template letter file from the temporary directory where you saved it on your PC (see Creating Mail Merge Letters, page 2-29), and select a document category to identify the type of letter (for example, whether it is a recruitment letter or an offer letter).

   Note: To add document categories, use the Application Utilities Lookups window to edit the "HR ADI Document Type" extensible lookup type. See: Adding Lookup Types and Values, page 3-99

4. Choose Apply to upload the document.

To Overwrite Template Letters:

1. Select Document Management from the Web ADI menu. The Document Management page appears.

2. Choose the Overwrite icon next to the name of the letter you want to update.

3. In the Overwrite Existing Document page, select the new version of the template letter file from the temporary directory where you saved it on your PC, then choose the Apply button. The new document is uploaded to the database, replacing the old one.

To Delete Template Letters:

1. Select Document Management from the Web ADI menu. The Document Management page appears.

2. Choose the Delete icon next to the name of the letter you want to delete.

   The document is deleted from the database.

   > **Note:** You cannot delete documents if they are in use by the Oracle HRMS application. If a template letter is linked to a layout, you must first unlink the document from the layout (see: Creating Links Between Template Letters and Layouts, page 2-32).

Creating Links between Template Letters and Layouts

You can create links between template letters in the Oracle HRMS database and the integrator and layout that you want to use to generate mail merges using the template.

To create links between template letters and layouts:

1. Select Manage Document Links from the Web ADI menu. The Web ADI Mail Merge page appears.

2. Select the integrator for the mail merge and choose Go.

3. A list of layouts for the integrator appears. Choose the Link icon next to the layout you want to link to your template letter. A list of documents that have been uploaded to the database is displayed (you can restrict the list of documents by using the Search feature).

4. Select the template letter you want to link to the layout, then choose the Select button. The template letter is associated with the document.

To remove links between template letters and layouts:

1. Select Manage Document Links from the Web ADI menu. The Web ADI Mail Merge page appears.

2. Select the integrator for the mail merge and choose Go.

3. A list of layouts for the integrator appears. Choose the Unlink icon next to the template letter you want to unlink from the layout. The link between the layout and the template letter is removed.

Configuring Web ADI

You can configure Web ADI to use your own integrators for downloading and uploading data between Oracle HRMS and spreadsheets or word processors.

To configure Web ADI:

System Administrator steps

1. Create new views if necessary.
2. Set up an integrator of the type required. See: Creating an Integrator in Web ADI, page 2-33
3. Define one or more layouts for the integrator. See: Defining a Layout in Web ADI, page 2-35

Creating Integrators in Web ADI

Creating integrators is a system administration step required to enable download or upload of data from and to windows for which no seeded integrator exists.

Web ADI has two types of integrators:

- Application Integrators
- Standalone Integrators

An Application Integrator links to a specific form. You typically use the form to download HRMS data, using some form restriction, modify the data, and then upload the data.

You use standalone integrators directly from the self-service menu function. These integrators allow you to create new data or download and update existing data. You can set up a query restriction to use at runtime. For Standalone Integrators the form name is GENERAL.

> **Note:** You must not call Application Integrators directly from the self-service menu function. These integrators rely on information passed to them from the form for which they are defined. In addition, you can link custom Application Integrators to Oracle-supplied forms only.

To create an integrator:

1. Select HR Create Document from the menu. The Settings page of the Web ADI

wizard appears.

> **Caution:** When moving between Web ADI pages, do not use your browser's Back or Forward buttons, as this causes information to be lost; instead, use the Back, Next and Cancel buttons displayed on the Web ADI page.

2. In the Settings page, select a spreadsheet viewer in the Viewer field.
3. Deselect the Reporting check box, as this integrator is used to upload data to the database.
4. In the Integrator page, select the seeded integrator "HR Integrator Setup".
5. In the Layout page, select the default layout "HR Integrator Setup".
6. In the Content page, select None.
7. In the Review page, you can see full details of the document that will be created. Choose the Back button if you want to change any of the information, or choose the Create Document button to continue.
8. A spreadsheet document is created, containing all the fields you need to enter to create your own integrator.

Download-only Integrators

If you are creating download-only integrators, including letter generation integrators, enter details in the following columns:

- METADATA_TYPE - select DOWNLOAD from the list of values.
- APPLICATION_SHORT_NAME - select the Application Short Name of your custom application from the list of values. The name appears from the FND_APPLICATION table.
- INTEGRATOR_USER_NAME - the name that appears when the end user selects the integrator in the Web ADI Create Document pages.
- VIEW_NAME - Web ADI uses a view to determine the tables and columns to download. Enter the name of the view you want to use to base the download on.
- FORM_NAME - the name of the window from which you want the integrator to be available to the user. Select GENERAL from the list of values, or select LETTER for a letter generation integrator.

If you are creating download-only and letter generation integrators, leave the

remaining columns blank.

To upload the integrator:

Follow the steps for uploading a spreadsheet. See: Uploading Data using Web ADI, page 2-22

Controlling Access to the Integrator:

You must associate at least one form function with the integrator for granting user access. See: Controlling Integrator Access, page 2-26

> **Note:** Your System Administrator must grant access for each new integrator to the Web ADI responsibility. Without this, you cannot create layouts for the integrators.

Defining Layouts in Web ADI

Each integrator must have at least one layout specifying the columns to appear in the spreadsheet.

To define a layout:

1. Choose Define Layout from the Web ADI menu. The Layout page appears.
2. Select the integrator for which you want to define the layout, and choose Go.
3. If the integrator already contains layouts, these are displayed. Choose the Define Layout button to define a new layout.

   System Administrators should always create at least one default layout for an integrator. End users can optionally create their own layouts to restrict the fields displayed to those they are concerned with.
4. In the Define Layout page, enter a unique name for the layout. This appears whenever the user is required to select the layout, so should clearly indicate the purpose of the layout.

   > **Note:** When you create a layout for use in running mail merges, the layout name must exactly match the Letter Name in the Letter window of the HRMS application.
5. Enter a unique key. The key is used internally by the system to identify the mapping.

6. The Field List defaults to the complete list of columns available in the view or API. Choose Continue. In the next page, you select a subset of these fields to include in your layout.

   Fields for a Letter Generation Layout

   - Choose Select All, so that the user can choose from all fields when entering field codes and creating their template letter.

To save the layout:

1. Choose Apply to save the layout.

Converting ADE Styles to Web ADI Integrators

Follow these steps to convert your ADE styles to Web ADI integrators.

To convert ADE styles to Web ADI integrators:

1. Check that your HR: Data Exchange Directory profile option is set to point to a directory accessible from your Oracle applications database.

2. Using the Global Super HRMS Manager responsibility, navigate to the Submit Request window, and select the Upgrade from ADE to Web ADI concurrent process.

3. In the Parameters dialog box, enter the name of your ADE.INI file in the ADE ini file name field. This file must be located in the directory referred to in the HR: Data Exchange Directory profile option.

4. Submit the request.

   Note: The request may complete with warning messages, because information that is required by Web ADI is not available in ADE. This is as expected, and can be corrected in Step 8.

5. Locate the output file from the concurrent process, which is placed in the same directory as the ADE.INI file. The output file has the name UPG*DDMMYYHHMISS*.CSV (where *DDMMYYHHMISS* represents the date and time the file was created).

6. Copy the output file to a local directory or shared network drive that you can access from your desktop.

   You can now create integrators using this file as the content.

7. Use the Create Document menu to create an integrator spreadsheet containing all

required columns (see: Creating Integrators, page 2-33), but when selecting the content for the spreadsheet, select Text File. In the Mapping page, select the UPG *DDMMYYHHMISS*.CSV file, and enter 1 in the Start Importing at Line Number field.

The process creates a spreadsheet containing the columns required to create an integrator, and transfers each ADE style from the text file into a separate row in the spreadsheet.

8. Missing information is shown in angle brackets in the appropriate column, for example, <<VIEWNAME>>. You must supply all missing values before you can upload the integrators.

   The following columns may have information missing:

   - VIEW_NAME. This information may be missing because some styles in ADE were defined without views, whereas Web ADI requires a view. Enter the name of the view to use to download the data.

   - APPLICATION SHORT NAME. Web ADI requires the short name of your custom application. Enter the application short name in each row.

9. When you have inserted all the missing information for each row, you can upload the spreadsheet, selecting All Rows in the Parameters page. See: Uploading Data using Web ADI, page 2-22. Each ADE style is converted to an integrator with the same name as the style.

10. Set up a layout for each style. See: Defining Layouts, page 2-35. For letter generation integrators, ensure that the layout name you use is the same as that of the letter name in the HRMS application.

Additional Steps for Letter Generation Integrators:

1. Upload your existing template letters to the Oracle applications database. See: Managing Template Letters, page 2-31

2. Link the layout to a template document. See: Creating Links between Template Letters and Layouts, page 2-32

Letter Generation

Letter Generation Overview

There are three different methods provided to create standard letters:

- Online Using Web Applications Desktop Integrator (Web ADI), page 2-10
- Concurrent processing using Word Processors, page 2-38
- Concurrent processing using Oracle Reports, page 2-38

Which Method Should You Use?

Use the online method (Web ADI), if you want to generate and review your letters immediately.

Web ADI enables you to generate standard letters and reports by retrieving data and exporting it to a data file that is merged with a standard word processed document. The word processed document includes all the merge fields required to merge the data and the standard text for the letter. Web ADI is fully compatible with Microsoft Word 6.

You can use Web ADI to generate standard letters for recruitment or enrollment by performing a mail merge from the Request Letter window in your application.

Alternatively, you can use the concurrent processing method to set up your standard letters. With concurrent processing, you generate and review your letters without interrupting other work you perform at your computer. You can control when a concurrent process runs and schedule long-running processes to run at times when the system is lightly loaded. Another advantage of using concurrent processing is that you do not need to have Windows 95 or 98, Excel or Lotus 123 installed.

Concurrent Processing

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

- Using word processors
- Using Oracle Reports

Using Word Processors

You can use any word processor to produce standard letters from Oracle HRMS. If you use a word processor, you can submit a concurrent request in the Letter Request window to generate the mail merge file. When the concurrent request is complete, you

can use your word processor's mail merge facilities to create the merged letters.

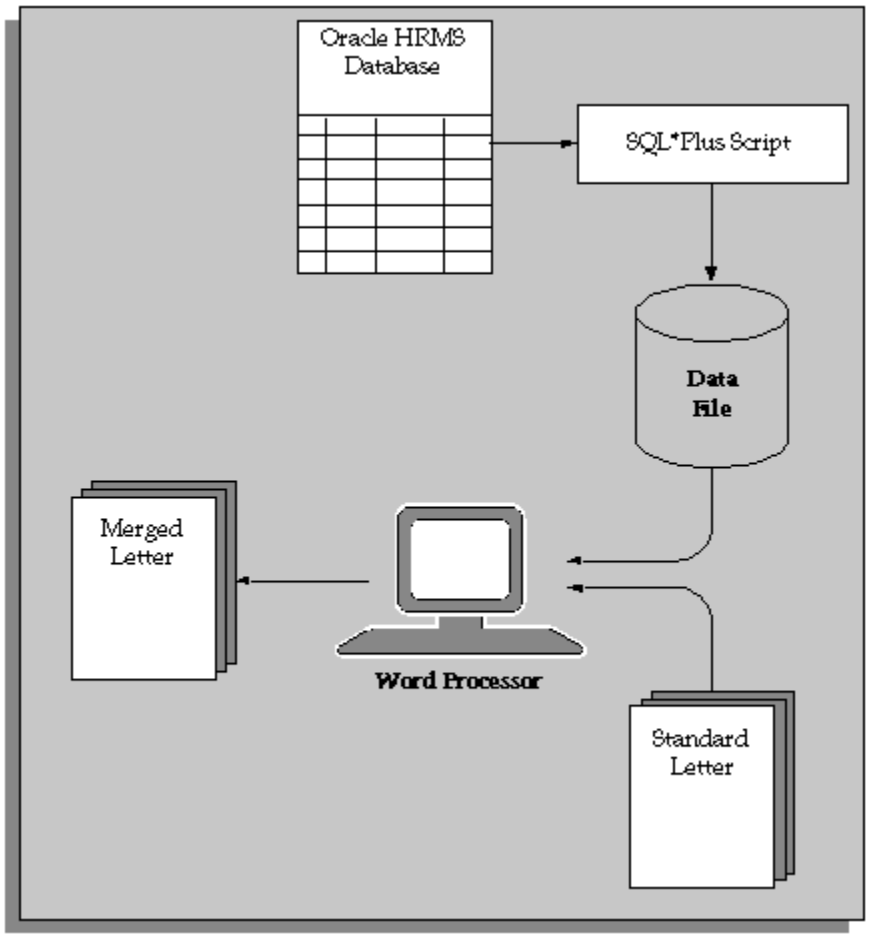
To create standard letters using a word processor, you need to extract the data you want to include in the letters from the Oracle HRMS database. To do this, create a program, such as a SQL*Plus script, to extract the data, which is then stored in a data file. You also write skeleton standard letters using your word processor.

> **Note:** Oracle HRMS supplies SQL*Plus script templates for use with MultiMate, WordPerfect and Microsoft Word. You can copy the SQL*Plus script templates and modify them to create the standard letters you require.

Each time you run your SQL*Plus script, it extracts data to the data file. You then use the mail merge features of your word processor to merge this data with the skeleton standard letters you previously prepared. This merging process creates the actual letters that you send out to students and applicants.

An overview of creating standard letters using a word processor is shown in the following figure.

Using a Word Processor



If you use Microsoft Word as your word processor, not only can you use the concurrent processing method to produce your standard letters, but you can also generate letters online using Oracle Web Applications Desktop Integrator (Web ADI)

See: Letter Generation Using Web ADI page , page 2-10

Using Oracle Reports

As an alternative to using a word processor to produce standard letters, you can use the Standard Letter and Label features of Oracle Reports. Use this method if you do not want to use word processors to print your letters (or if you do not have word processors).

See: Linking the Report with a Letter, page 2-54

Example Files

PERWPOUK Template

The template SQL*Plus script for mail merge letters for Microsoft Word is PERWPOUK.sql. See: Writing a SQL*Plus Script for Microsoft Word, page 2-50

The following section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.

```
WHENEVER SQLERROR EXIT FAILURE ROLLBACK
REM Define the MS Word mail merge record separator
DEFINE ch="'%'"
REM Define the column width for returning query results
COLUMN L1 FORMAT A2000
SET PAUSE OFF
SET FEEDBACK OFF
SET RECSEP OFF
SET HEADING OFF
SET VERIFY OFF
SET TERMOUT OFF
SET PAGESIZE 0
```

The following section creates a row in the Application Object Library table (AOL) FND_SESSIONS. This enables the datetrack security views to be accessed for the session.The &2 argument contains the current SQL*Forms session date.You should produce this section exactly as you see it when you define your mail merge file.

```
REM Insert session row
insert into fnd_sessions(session_id ,effective_date)
select  userenv('SESSIONID'),
        to_date('&2','DD-MON-YYYY')
from    sys.dual
/
```

The following section has two functions:

1. To set the mail merge header linesize. This is dependent on the character length of all the mail merge items you want to use. In the example, the header linesize equates approximately to 220 characters.

2. To enable the spooling of the SQL results. You must remove the REM keyword from the line that spools output to a file for the Microsoft Mailmerge. If you use concurrent processing to generate the data source file, Concurrent Manager creates the output file.

```
REM Set length of the header
SET LINESIZE 220
REM Create the mail merge 'header' record for MS Word
REM Note: SPOOL command commented out for concurrent manager.
REM       PC based solution required the SPOOL command.
REM spool perwpouk.txt
```

The following section defines the mail merge header information. These are the mail

merge fields you integrate with your word processed letter. Each mail merge field is delimited by the pre-defined &ch character. Ensure that the field size does not exceed 40 characters and that the field name does not include white spaces. Do not forget that the length in characters of this selected row from sys.dual is the LINESIZE value you specified above.

```
select  'address_line1'         ||&ch||
        'address_line2'         ||&ch||
        'address_line3'         ||&ch||
        'town_or_city'          ||&ch||
        'country'               ||&ch||
        'postal_code'           ||&ch||
        'applicant_title'       ||&ch||
        'applicant_last_name'   ||&ch||
        'position_name'         ||&ch||
        'organization_name'     ||&ch||
        'grade_name'            ||&ch||
        'projected_hire_date'   ||&ch||
        'recruiter_title'       ||&ch||
        'recruiter_last_name'   ||&ch
from    sys.dual
/
```

After selecting your mail merge header information, you must re-set the LINESIZE to the maximum to VARCHAR2 size which is 2000.

```
REM re-initialise the linesize to the maximum 2000 varchar2 length
SET LINESIZE 2000
```

The following section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter.The RPAD function pads out the row of information with # for all white spaces. Without this function, mail merge cannot distinguish when a row/record has ended.The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

```
REM Mail merge interview query
select  rpad(
        nvl(pa.address_line1,' ')
||&ch||
                nvl(pa.address_line2,' ')
||&ch||
                nvl(pa.address_line3,' ')
||&ch||
                nvl(pa.town_or_city,' ')
||&ch||
                nvl(ft.territory_short_name, ' ')
||&ch||
                nvl(pa.postal_code,' ')
||&ch||
                nvl(hl1.meaning, ' ')
||&ch||
                nvl(pp1.last_name, ' ')
||&ch||
                nvl(pos.name, ' ')
||&ch||
                pou.name
||&ch||
                nvl(pg.name, ' ')
||&ch||
                nvl(to_char(pappl.projected_hire_date,
                            'fmDay fmddth "of" fmMonth YYYY'), ' ')
||&ch||
                nvl(hl2.meaning, ' ')
||&ch||
                nvl(pp2.last_name, ' ')
||&ch,
                2000, '#') L1

from            per_addresses                   pa,
                fnd_territories                 ft,
                hr_lookups                      hl1,
                hr_lookups                      hl2,
                hr_all_organization_units       pou,
                per_positions                   pos,
                per_grades                      pg,
                per_applications                pappl,
                per_all_people                  pp1,
                per_all_people                  pp2,
                per_all_assignments             pasg1,
                per_letter_request_lines        plr
```

```
where           plr.letter_request_id           = &1
and             pp1.person_id                   = plr.person_id
and             pa.primary_flag         (+)     = 'Y'
and             pa.person_id            (+)     = pp1.person_id
and             ft.territory_code       (+)     = pa.country
and             hl1.lookup_code         (+)     = pp1.title
and             hl1.lookup_type         (+)     = 'TITLE'
and             pasg1.assignment_id     (+)     = plr.assignment_id
and             pos.position_id         (+)     = pasg1.position_id
and             pou.organization_id     (+)     = pasg1.organization_id
and             pg.grade_id             (+)     = pasg1.grade_id
and             pappl.application_id    (+)     = pasg1.application_id
and             pp2.person_id           (+)     = pasg1.recruiter_id
and             hl2.lookup_code         (+)     = pp2.title
and             hl2.lookup_type         (+)     = 'TITLE'
/
REM Note: SPOOL command commented out for concurrent manager.
REM       PC based solution required the SPOOL command.
REM spool off
```

The following section updates the letter request from Pending to Complete (as the example is for letter requests).

```
REM update the letter request_status from PENDING to COMPLETE
update per_letter_requests plr
set    plr.request_status      = 'COMPLETE'
where  plr.letter_request_id   = &1
and    plr.request_status      = 'PENDING'
/
```

The following section deletes the row inserted into FND_SESSIONS.

```
REM delete the session row created
delete from fnd_sessions fs
where  fs.session_id = userenv('sessionid')
and    fs.effective_date = to_date('&2','DD-MON-YYYY')
/
```

The following section commits the changes and exits the SQL*Plus session.

```
REM commit the changes
commit
/
exit
```

PERWPWUK Template

The template SQL*Plus script for mail merge letters for MultiMate or WordPerfect is PERWPWUK.sql. See: Writing a SQL*Plus script for MultiMate or WordPerfect, page 2-49

The following section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.

```
REM
DEFINE line_size=80
DEFINE field_size= &line_size-1
DEFINE ch="'%'"
SET PAGESIZE 0
SET LINESIZE &line_size
BREAK ON L1 SKIP PAGE
COLUMN L1 FORMAT A&line_size
COLUMN L2 FORMAT A&line_size
COLUMN L3 FORMAT A&line_size
COLUMN L4 FORMAT A&line_size
COLUMN L5 FORMAT A&line_size
COLUMN L6 FORMAT A&line_size
COLUMN L7 FORMAT A&line_size
COLUMN L8 FORMAT A&line_size
COLUMN L9 FORMAT A&line_size
SET FEEDBACK OFF
SET RECSEP OFF
SET HEADING OFF
SET VERIFY OFF
SET TERMOUT OFF
```

The following section creates a row in the Application Object Library table (AOL) FND_SESSIONS. The &2 argument contains the current SQL*Forms session date.You should produce this section exactly as you see it when you define your mail merge file.

```
insert into fnd_sessions
(session_id ,effective_date)
select  userenv('SESSIONID')
,       to_date('&2','DD-MON-YYYY')
from  sys.dual
/
```

After selecting your mail merge header information, you must re-set the LINESIZE to the maximum to VARCHAR2 size which is 2000.

```
REM re-initialise the linesize to the maximum 2000 varchar2 length
SET LINESIZE 2000
```

The following section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter.The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

```
select nvl(t.meaning||' '||p.first_name||' '||p.last_name, ' ')||&ch||
 nvl(a.address_line1,' ') ||&ch||
 nvl(a.address_line2,' ') ||&ch||
 nvl(a.address_line3,' ') ||&ch||
 nvl(a.town_or_city,' ')  ||&ch||
 nvl(a.region_1, ' ')     ||&ch||
 nvl(a.postal_code,' ')   ||&ch||
 nvl(t.meaning||' '||p.last_name,' ')
from  per_addresses a,
 per_people p,
 per_letter_request_lines s,
 hr_lookups t
where  a.person_id (+) = p.person_id
and  p.person_id = s.person_id
and  p.title = t.lookup_code (+)
and  t.lookup_type (+) = 'TITLE'
and  s.letter_request_id = &1
/
```

The following section updates the letter request from Pending to Complete (as the example is for letter requests).

```
update per_letter_requests r
set    r.request_status    = 'COMPLETE'
where  r.letter_request_id = &1
and    r.request_status    = 'PENDING'
/
```

The following section commits the changes and exits the SQL*Plus session.

```
commit
/exit
/
```

OTA SQL*Plus Script

Example SQL mail merge file. See: Writing a SQL*Plus Script for MultiMate or WordPerfect, page 2-49 and Writing a SQL*Plus Script for Microsoft Word, page 2-50

The template to produce confirmation letters is OTA.sql.

The following section defines the required SQL*Plus environment settings.You should produce this section exactly as you see it when you define your mail merge file.

```
WHENEVER SQLERROR EXIT FAILURE ROLLBACK
REM Define the MS Word mail merge record separator
DEFINE ch="'%'"
REM Define the column width for returning query results
COLUMN L1 FORMAT A2000
SET PAUSE OFF
SET FEEDBACK OFF
SET RECSEP OFF
SET HEADING OFF
SET VERIFY OFF
SET TERMOUT OFF
SET PAGESIZE 0
```

The following section creates a row in the Application Object Library table (AOL) FND_SESSIONS. This enables the datetrack security views to be accessed for the session. The &2 argument contains the current SQL*Forms session date.You should

produce this section exactly as you see it when you define your mail merge file.

```
REM Insert session row
insert into fnd_sessions(session_id ,effective_date)
select  userenv('SESSIONID'),
       to_date('&2','DD-MON-YYYY')
from  sys.dual
/
```

The following section has two functions:

1. To set the mail merge header line size. This is dependent on the character length of all the mail merge items you want to use. In the example, the header line size equates approximately to 220 characters.

2. To enable the spooling of the SQL results. The spool file should match the name of the SQL file you are writing, but with a text file extension. 2.2

```
REM Set length of the header
SET LINESIZE 200
REM Create the mail merge 'header' record for MS Word
REM Note: SPOOL command commented out for concurrent manager.
REM       PC based solution required the SPOOL command.
RWM spool xxxxx.txt
```

The following section defines the mail merge header information. These are the mail merge fields you integrate with your word processed letter. Each mail merge field is delimited by the pre-defined &ch character. Ensure that the field size does not exceed 40 characters and that the field name does not include white spaces. Do not forget that the length in characters of this selected row from sys.dual is the line size value you specified above.

```
select   'student_title'        ||&ch||
         'student_first_name'   ||&ch||
          'student_last_name'    ||&ch||
         'event_name'           ||&ch||
          'event_code'           ||&ch||
          'event_end_date'       ||&ch
from  sys.dual
/
```

After selecting your mail merge header information, you must re-set the line size to the maximum VARCHAR2 size, which is 2000.

```
REM re-initialise the linesize to the maximum 2000 varchar2 length
SET LINESIZE 2000
```

The following section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter.The RPAD function pads out the row of information with # for all white spaces. Without this function, mail merge cannot distinguish when a row/record has ended.The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

```
REM Mail merge confirmation query
 select rpad(
 initcap(nvl(d.delegate_title_meaning,' ' ))           ||&ch||
        nvl(d.delegate_first_name,' ')                  ||&ch||
        nvl(d.delegate_last_name,' ' )                  ||&ch||
        nvl(v.description,' ')                          ||&ch||
        nvl(d.event_activity_version_name,' ' )         ||&ch||
        to_char(d.course_end_date, 'DD fmMonth YYYY')   ||&ch,
        2000, '#')                       L1
   from ota_delegate_bookings_v              d,
 ota_activity_versions   v,
        per_letter_request_lines    plr
  where plr.letter_request_id    = &1
  and   (plr.ota_booking_id    = d.booking_id
  or     plr.ota_event_id   = d.event_id)
  and   d.activity_version_id                   = v.activity_version_id
/

REM Note: SPOOL command commented out for concurrent manager.
REM       PC based solution required the SPOOL command.
REM spool off
```

The following section updates the letter request from Pending to Complete (as the example is for letter requests).

```
REM Update the letter request_status from PENDING to COMPLETE
update per_letter_requests plr
set plr.request_status ='COMPLETE'
where plr.letter_request_id =&1
and plr.request_status ='PENDING'
/
```

The following section deletes the row inserted into FND_SESSIONS.

```
REM delete the session row created
delete from fnd_sessions  fs
where  fs.session_id   = userenv('sessionid')
and    fs.effective_date  = to_date('&2','DD-MON-YYYY')
/
```

The following section commits the changes and exits the SQL*Plus session

```
REM commit the changes
commit
/
exit
/
```

Planning Standard Letter Requirements

Before creating standard letters, you need to identify several things.

To plan standard letter requirements:

1. Identify the database information to include in the letters.

   You need to identify the select statements to provide you with the data as the *content* of your letters. Oracle HRMS supplies you with SQL*Plus scripts as templates to help you do this.

2. Identify the text that you want to include as the *body* of your letters.

3. Decide whether to associate your standard letters with student enrollment or applicant assignment statuses.

4. Identify which statuses you want to trigger your standard letters (if you do want to link your standard letters to student enrollment or applicant assignment statuses).

For example, do you want to link your standard enrollment confirmation letter to the status Placed so that the letter is triggered when you set a student's enrollment status to Placed? Do you want to link your standard rejection letter to the status Rejected so that it is triggered when an applicant's assignment status is set to Rejected?

Writing a SQL*Plus Script for MultiMate or WordPerfect

Oracle HRMS supplies you with SQL*Plus scripts as templates for extracting database information for standard letters. You can copy the SQL*Plus script templates and modify them to create the standard letters you require.

The template scripts Oracle HRMS provides are:

Scripts	Purpose	Used By
PERWPMUK.sql	Example UK SQL*Plus script for MultiMate	HR
PERWPMUS.sql	Example US SQL*Plus script for MultiMate	HR
PERWPWUK.sql	Example US SQL*Plus script for WordPerfect	HR
PERWPWUS.sql	Example US SQL*Plus script for WordPerfect	HR

One of the template SQL*Plus scripts (PERWPWUK.sql) is provided as a example. See: PERWPWUK Template, page 2-41

Oracle Training Administration does not provide template scripts, but we provide an example of a Confirmation letter SQL mail merge file. See: OTA SQL*Plus Script, page 2-41

To write a SQL*Plus script for MultiMate or WordPerfect:

1. Copy the appropriate SQL*Plus script from the server side sql directory of the HR product tree (consult your installation guide for details).

2. Edit (or write) a SQL*Plus script to select data from the database in a format your word processor can read and that is compatible with the standard letter.

3. Save the file with the name PERWP*** (or OTAWP*** for OTA).

   You must use this prefix for the system to recognize it as a type of letter. See your Oracle Applications installation server guides for details of where the concurrent manager places the files.

Writing a SQL*Plus Script for Microsoft Word

Oracle HRMS supplies four SQL*Plus script templates.

You can run the scripts on the server side and make them accessible to other users across the network, or you must copy them to a directory which is accessible from the PC, such as a network drive.

The template scripts that Oracle HRMS provides are:

Scripts	Purpose	Used By
PERWPOUS.sql	Example US Offer letter SQL mail merge file	HR
PERWPOUK.sql	Example UK Offer letter SQL mail merge file	HR
PERWPIUS.sql	Example US Interview letter SQL mail merge file	HR
PERWPIUK.sql	Example UK Interview letter SQL mail merge file	HR

One of the template SQL*Plus scripts is provided as an example. See: Template SQL*Plus Script PERWPOUK, page 2-41

Oracle Training Administration does not provide template scripts, but we provide an example of a Confirmation letter SQL mail merge file. See: OTA SQL*Plus Script, page 2-41

To write a SQL*Plus script for Microsoft Word:

1. Copy the SQL*Plus scripts from the server side sql directory of the HR product tree. (Consult your installation guide for details).

2. Edit (or write) a SQL*Plus script to select data from the database in a format your

word processor can read and is compatible with the standard letter.

3. Save the file with the name PERWP*** (or OTAWP*** for OTA).

   You must use this prefix for the system to recognize it as a type of letter. See your Oracle Applications installation server guides for details of where the concurrent manager places the files.

Registering the SQL*Plus Script

Register your SQL*Plus program with Oracle HRMS. You register your program so that you can run it as a concurrent program. Name the file PERWP*** (or OTAWP***). You must use this prefix for the system to recognize it as a type of letter.

You use the Concurrent Programs window to register your program (using a system administrator responsibility).

See: 'Concurrent Programs Window, *Oracle Applications System Administrators Guide*

Linking the SQL*Plus Script With a Letter

You need to link your SQL*Plus script with a letter and one or more statuses. In Oracle Human Resources, you can link one or more applicant assignment statuses with each recruitment letter. A request for the letter is then created automatically when an applicant is given an associated assignment status. For example, you can link your standard recruitment rejection letter to the status Rejected so that the letter is triggered when you set an applicant's assignment status to Rejected.

In Oracle Training Administration, you can link one or more enrollment statuses with each enrollment letter. A request for the letter is then created automatically when an enrollment is given an associated status.

Define your standard letter types in the Letter window.

To define a standard letter type:

1. Enter a name for the letter in the Name field.

2. Select the Concurrent Program Name assigned by your System Administrator to the SQL*Plus script.

   For Oracle Human Resources:

3. Select one or more applicant assignment statuses to create letter requests automatically for applicants, and check the Enabled box.

   When an applicant is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the applicant is added to the list of people to receive the letter when you submit the

request.

For Oracle Training Administration:

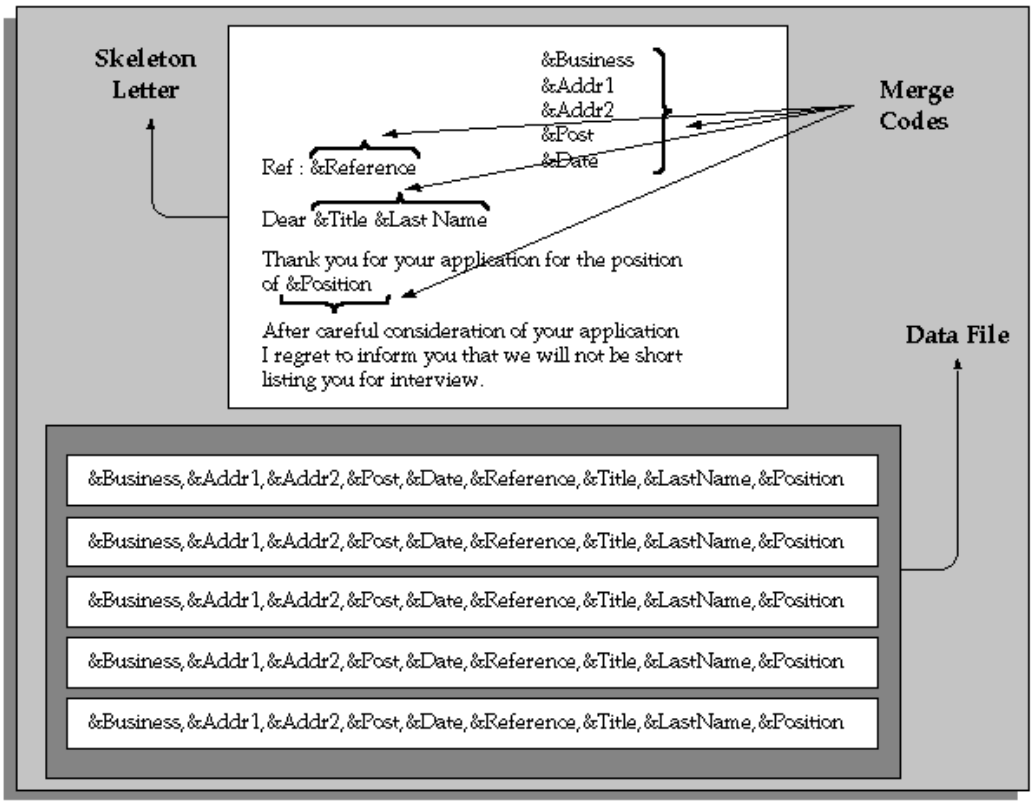
4. Select one or more enrollment statuses to create letter requests automatically for enrollments, and check the Enabled box.

   When an enrollment is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the enrollment is added to the list of people to receive the letter when you submit the request.

Writing a Skeleton Letter

Write a skeleton letter using your word processor. Include the appropriate merge codes from the data source for the word processor you are using.

Merging Data with Standard Letters



The mail merge feature of any word processor enables you to merge text from the data file you create into a standard letter. Each line in the data file contains the text to merge into one standard letter for one recipient.

Within the program, you can format the data and include the characters that are recognized as separators by your word processor.

A standard letter comprises standard text with a number of embedded variables in it. When you print the letter, the variables are replaced with specific items of data, such as name and address details for different people.

Merging the Data File with the Standard Letter

When the concurrent manager has finished processing a letter request, you can merge the data in the Data File with your skeleton letters.

To merge the data file with the standard letter:

1. Merge the data in the Data File with your skeleton letters to create your standard letters. The merging of text and data files is normally carried out using the mail merge features of your word processor.

If you do not have access to the directory where the Data File resides (consult your installation guide for details of the location Concurrent Manager places the file), you need to transfer the mail merge files created by the concurrent process to your word processor before you can merge the data file with the skeleton letters.

2. If you are using a word processor to merge the data file, you need to save the merged letters you generate.

   If you do not save the merged letters, when you exit the word processor you lose the letters. You do not lose the data file or the skeleton letter, however.

Linking the Report With a Letter

You need to link your report with a letter and one or more statuses. In Oracle Human Resources, you can link one or more applicant assignment statuses with each recruitment letter. A request for the letter is then created automatically when an applicant is given an associated assignment status. In Oracle Training Administration, you can link one or more enrollment statuses with each enrollment letter. A request for the letter is then created automatically when an enrollment is given an associated status.

For example, you can link your standard recruitment rejection letter to the status Rejected so that the letter is triggered when you set an applicant's assignment status to Rejected.

Define your standard letter types in the Letter window.

To define a standard letter type:

1. Enter a name for the letter in the Name field.

2. Select the concurrent program name assigned by your system administrator to the report.

   For Oracle Human Resources:

3. Select one or more applicant assignment statuses to create letter requests automatically for applicants, and check the Enabled box.

   When an applicant is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the applicant is added to the list of people to receive the letter when you submit the request.

   For Oracle Training Administration:

4. Select one or more enrollment statuses to create letter requests automatically for enrollments, and check the Enabled box.

   When an enrollment is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the

enrollment is added to the list of people to receive the letter when you submit the request.

Writing and Registering the Report

You need to write and register the report.

To write and register the report:

1. Identify which data you want to extract from the database. Write your skeleton letter text and Select statements specifying the data to be extracted from the Oracle database.

2. Register your report with Oracle HRMS. You register your report so that you can run it as a concurrent program. Name the file PERWP*** (or OTAWP*** for OTA). You must use this prefix for the system to recognize it.

   You use the Concurrent Programs window to register your report (using a system administrator responsibility).

   See: 'Concurrent Programs Window, *Oracle Applications System Administrators Guide*

Requesting Letters/Running the Report

When you, or other users, set the status for an applicant or enrollment that triggers your standard letters, Oracle HRMS creates a letter request automatically, with the status of Pending. It also adds the applicant's or student's name to the request. You can view the pending request and names through the Request Letter window.

Then, when you change the letter request from Pending to Requested, Oracle HRMS runs the report or SQL*Plus script for this type of letter.

Depending on the requirements of your enterprise, you can generate letter requests for every organization within your enterprise or you can generate separate letter requests for each vacancy you define. If you want to generate separate letter requests by a specific vacancy you must select Yes for the HR: Restrict Letter by Vacancy Name or Event profile.

The advantages of restricting the generation of letters to a specific vacancy is that you can process letters for one organization without affecting another organization within your enterprise.

See: User Profiles, page 1-59

You can add further names to the list manually, if required. For example, you might have a last minute acknowledgement letter to send.

You can also create manual letter requests. You do this by entering the status of Pending yourself, then entering all the recipients of the letter before changing the status

of the letter to Requested.

To submit an automatic letter request:

1. Query the letter you require in the Letter Name field.
2. Ensure that the method is Automatic.
3. Select the vacancy in the Vacancy Name field.

   Note: You must set the HR: Restrict Letter by Vacancy or Event profile to Yes to enable this field.

4. Move to the Requested For block to query the applicants, events or students that have been entered automatically on this request, according to their status. You can add further names manually.
5. Update the status from Pending to Requested.
6. Save your changes.

   A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.

7. You can query the request ID in the Concurrent Requests window and monitor its progress.

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

To create a manual letter request:

1. Select the Letter Name for the letter type you want to request.
2. Ensure that the method is Manual.
3. Select the vacancy in the Vacancy Name field.

   Note: You must set the HR: Restrict Letter by Vacancy or Event profile to Yes to enable this field.

4. Leave the status of the request as Pending.
5. Save the changes.

Adding the Names

6. Select the names to add:

   - Select employees or applicants (for Oracle Human Resources) to receive the letter in the Requested For region.

     The Assignment field displays the organization to which the person is assigned. You can view the other components of the assignment by choosing List of Values from the Edit menu.

   - Select events or students or both (for Oracle Training Administration) in the Requested For region.

     This depends on how the letter has been set up on your system. For example, an enrollment confirmation letter might be defined so that it is sent to all students with the status Confirmed who are enrolled on the event selected in the Requested For region.

7. Save the changes.

Changing the Status

8. Update the status from Pending to Requested.

9. Save the changes.

   A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.

10. You can query the request ID in the Concurrent Requests window and monitor its progress.

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

Performing the Next Step:

If your letters are produced by Oracle Reports, they are ready for printing. If you use your word processor's mail merge facility, you are ready to merge the data. See: Merging the Data File With the Standard Letter, page 2-53

3

Extending Oracle HRMS

Extend Oracle HRMS Overview

This section describes how you can extend Oracle HRMS to better meet your enterprise's needs.

There are many ways you can configure Oracle HRMS to meet the needs of your business processes:

- Linking windows together in a task flow to streamline data entry and processing
- Designing your own windows to create user or task-specific windows
- Restricting data access on windows to provide security and confidentiality

You can configure Oracle HRMS using one or any combination of these.

Before configuring any part of Oracle HRMS, it is advisable to plan ahead and decide which parts of the system you want to configure. For example, if you know that your users typically perform a task in a certain way, you can design windows to help them enter information more efficiently. You can also link windows together to help users move from one window to the next. If necessary, you can also restrict what information appears in lists of values and restrict access to certain types of information.

Key Concepts

This section describes some of the tools available to configure Oracle HRMS for your enterprise.

Alerts

Alerts enable you to inform, remind, and confirm information on your personal information, your direct reports, and your workforce. The alert triggers an email notification of an impending action, task, or change to information. For example, you can set up an alert to remind you when a new hire is due to start work.

See: Oracle HRMS Predefined Alerts, page 3-109

Flexfields

You can add data fields called flexfields to windows to hold any additional information you require. You can add:

- *Key flexfields* to configure some of the most important parts of the system, including the names of jobs, positions and grades, details of payroll cost allocation, and analysis information for employees and other people.
- *Descriptive flexfields* to add fields to windows to record additional information.
- *Extra Information Types* to set up multiple categories of information for the most important entities in Oracle HRMS. For example, you might use EITs to add details to assignment records in special circumstances, such as information about a leave of absence or extra information about a temporary assignment to a project.

Protected Flexfields are predefined and protected flexfields supplied with Oracle HRMS. There are two key protected flexfields and three descriptive protected flexfields. Your localization team defines these flexfields to meet the specific legislative and reporting needs of your country.

User-Defined Tables

You can set up user tables to provide matrixes of valid values that vary, such as age, or job, or number of years service. You can access these values from formulas, or your own forms or reports. The GET_TABLE_VALUE function is supplied for use in your formulas. Certain legislations include predefined user tables, for example, to hold values for payroll calculations.

Lookups

Lookups provide lists of valid values on certain fields throughout the system. For many lookups you can add your own values and change the predefined values. Lookups not only ensure that all users use the same terminology, but also speed up data entry.

CUSTOM Library Events

You can use CUSTOM Library Events to configure the logic that is executed at defined points within a window. Generic events are available to all Oracle Applications and Product Specific Events are also available to help you to apply business rules specific to Oracle HRMS.

APIs (called Application Programmatic Interfaces)

Oracle HRMS provides a set of PL/SQL packaged procedures and functions that together provide an open interface to the database.

Task Flows

You often need to use more than one window to complete many tasks. Oracle HRMS enables you to link these windows together using a *task flow*. Users can choose a button to bring up each window in turn without returning to the menu. For example, to hire an employee, you typically go from the People window, to the Address window, to the Special Information window, to the Assignment window, and so on. Task flows speed up processes and reduce data entry errors.

See: Task Flow, page 3-139

Restricting Information

You can restrict the data available on certain windows. For example, you could restrict the information on a People Management template to applicants only or employees only.

Restricting the type of information available on a window is useful as a security measure. For example, you can create versions of Compensation windows to show only compensation types available to the logged-in user.

You can restrict information on People Management templates using the People Management Configurator. See: People Management Configurator, page 3-160

You can restrict data using a wider range of criteria on the People Management form and a number of other forms using CustomForm.

See: Windows You Can Configure Using CustomForm, page 3-235

Configuration Template Forms

You can design forms to help users to perform their tasks quickly and efficiently. Predefined templates can serve as guidelines to design forms for the core People Management processes in your enterprise.

A template form can consist of up to three separate windows:

- A **Find window** to enable queries to be performed
- A **Summary window** to display people and assignment information
- A **Maintenance window** to enable the entry and update of information

You can design the new windows to complete a whole process such as hiring an applicant. For example, users can use the Maintenance window to enter and maintain an applicant's details and the Find window to find groups of applicants to work with. You add the new template forms to the menu so that users can access them from the navigator in the same way as all the other windows.

See: People Management Templates, page 3-162

You configure the predefined templates to create your own windows using the People

Management Configurator tool.

See: People Management Configurator, page 3-160

Currencies

You need to define the formats for displaying currency amounts. If required, you can use multiple currencies for entering information about employee compensation and benefits and you can also record your payment methods to employees in different currencies. You must enable at least one currency as the default currency for all information related to money in your system. This default is known as the Base Currency for your Business Group.

Extend Oracle HRMS

You can extend Oracle HRMS to meet the needs of your enterprise.

You can configure Oracle HRMS by designing windows to match your specific business processes. Configuring windows enables your users to perform their tasks more efficiently.

How can you hold additional information?

You can add data fields to windows to hold any additional information you require. Flexfields are flexible fields that enable you to do this.

Then, when you click in a flexfield you have set up, a window opens, displaying segments into which you can enter data.

You can also set up your own tables to hold data such as wage codes, shift differentials, or the amounts of certain deductions

How can you ensure the same terminology is used and speed up data entry?

Oracle provides lists of values called *lookups* for certain items of information. Lookups ensure that all users use the same terminology, making it easier to inquire and report on information. Lookups also speed up data entry because you can enter just enough to identify the value, and the system completes the entry.

Can you configure windows to match the business needs of your enterprise?

Yes. For the core employee management information you can use the People Management Configurator tool to design your own windows to match the tasks performed in your enterprise. A set of predefined *templates* are provided as examples of how you can design new windows.

How is security affected by configuring windows?

Any windows that you configure behave in the same way as existing windows. Security is set by the user's security profile option and responsibility. However, you can configure the Find results window to enable users to see information for people outside of their security profile. They cannot change this information.

In addition, you can create windows that:

- Restrict the list of values on certain fields or limit access to certain types of information
- Use workflow so that any data changes must be approved before the changes are applied to the database. This applies to the windows that are based on templates.

Can you restrict the amount of data that users have to enter?

Yes. If you design windows using the templates, they offer greater flexibility for defaulting values in fields. You can also hide fields where you require no input from users, and you can restrict the list of values on other fields that are displayed in the windows.

What happens to the online help when you design new windows?

Online help is provided for the windows that have been created using the predefined templates. If you make changes to the windows or create new windows, you can edit the online help to make it match the new way of performing the tasks.

Can you define the formats for currency?

Yes. You can define the formats for displaying currency amounts.

Flexfields

Flexfields

Flexfields are flexible fields that enable you to configure and extend Oracle Applications by adding fields to windows. There are two types of flexfield:

- *Key flexfields* enable you to define additional information you want to record in existing fields.
- *Descriptive flexfields* enable you to add fields to windows to record additional information.

  Extra Information Types (EITs) are a type of descriptive flexfield that enable you to set up unlimited amounts of extra information for eight of the most important entities in Oracle HRMS.

You can set up each flexfield to contain a number of segments, which act like separate fields.

When a user clicks in a flexfield you have set up, a window opens, displaying the segments that you have defined. For each segment, you can define:

- Its prompt
- The type of data it can contain
- The values a user can enter

You can provide a list or range of valid values. You also control the size and display characteristics of each segment and the sequence in which the segments appear.

User Definable Key Flexfields

In Oracle HRMS there are eight user definable key flexfields:

- Job
- Position
- Grade
- Competence
- People Group
- Personal Analysis

- Cost Allocation
- Collective Agreement Grades

The Personal Analysis and Collective Agreement Grades key flexfields can have an unlimited number of structures. All other flexfields can have only one structure each.

You can define up to 30 segments for each structure in all key flexfields except for the Collective Agreement Grades key flexfield. This can have up to 20 segments for each structure.

How Oracle HRMS Uses Key Flexfields

Oracle HRMS uses key flexfields in a number of distinct ways:

Unique Identifiers

The Job, Position, Grade Name, and Competence flexfields enable you to create a unique name, which is a combination of separate components or segments. You can use these flexfields when you are defining the work structures and competencies that exist in your enterprise.

> **Tip:** When you are defining your requirements for these key flexfields you should consider the following points:

- The task of defining the segment combinations is normally restricted to one or two users only. Therefore, you may not need to use value sets, or cross validation rule options to control the values that can be entered.
- The names that users see are made up of a combination of segment values. The segment values are displayed, not the meanings.
- Avoid segments containing information that may change regularly. There is no history of changes to the combinations you create. For example, do not define minimum and maximum values for grades as segments of the Grade flexfield.

Analysis Information

The People Group and Personal Analysis flexfields enable you to add key information to records of employee assignments and people. You can use the individual segments of these flexfields to identify or report on specific groups of people.

Payroll Costing

The Cost Allocation key flexfield is used to collect and to accumulate costs associated with running a payroll.

Collective Agreement Grade Structures

The Collective Agreement Grades key flexfield enables you to create an unlimited number of grade structures. You use the individual segments of each grade structure to record the grade factors that are defined within a collective agreement.

Once the grade structure is recorded you can link it to a collective agreement and enter the required factor values for each reference grade in the Agreement Grades window.

What You Must Set Up

The key flexfields are central to Oracle HRMS, therefore you must create certain definitions before you can set up your business group.

Position and Grade Key Flexfields

- You can only define one structure per business group for each of these flexfields.
- Use of these flexfields is optional, but almost all Oracle HRMS installations use the Grade flexfield. Positions are used most often in large, highly structured enterprises, such as those in the areas of government, education, and health care.
- You must define a structure name for these two flexfields before you can define a business group.
- You associate these structures with a business group in the Business Group Information window, which opens from the Organization window.
- It is essential to run the Create Key Flexfield DB Items process whenever you create or change the Grade or Position key flexfield definitions. See: Creating Key Flexfield Database Items, page 3-26

Job Key Flexfields

- Use of this flexfield is optional.
- You must define at least one structure name for the job key flexfield before you can define a business group.
- You associate this structure with a business group in the Business Group Information window, which opens from the Organization window. This defines the key flexfield that is used for the Default HR Job Group.
- You can create a number of different structures for the job key flexfield and then associate them with user defined job groups.
- It is essential to run the Create Key Flexfield DB Items process whenever you create

or change the Job key flexfield definitions. See: Creating Key Flexfield Database Items, page 3-26

Competence Key Flexfield

- You must define a structure name for this flexfield before you can define a business group.
- You can only define one structure per business group for this flexfield.
- You associate this structure with a business group in the Business Group Information window, which opens from the Organization window. This defines the key flexfield that is used when creating competencies specific to the business group.
- You can create an additional key flexfield that can be used to create global competencies that are available across all business groups. You can, however, use the same key flexfield you have defined for the business group if you want. You define this key flexfield in the HR: Global Competence Flex Structure profile option.
- You must specify one of the segments as the Default Attribute using the flexfield qualifier. You must also attach the Others flexfield qualifier to all other segments in the structure.

People Group Key Flexfield

- You can only define one structure per business group for this flexfield.
- You do not create separate combinations of segments for the People Group flexfield. You enter values for each employee as part of the employee assignment.
- You must define a structure name for this flexfield before you can define a business group.
- You must define at least one segment for the People Group flexfield in order to be able to use the Assignmentwindow.
- It is essential to run the Create Key Flexfield DB Items process whenever you create or change the People Group key flexfield definition. See: Creating Key Flexfield Database Items, page 3-26

Personal Analysis Key Flexfield

- You can create any number of structures per business group for this flexfield. Each one represents a Special Information Type.
- You do not need to define any structures for the Personal Analysis flexfield before

you can use Oracle HRMS.

- You link each structure to a business group in the Special Information Types window while you are logged on to that business group.
- You can configure windows to restrict access to specific Information Types, such as medical or disciplinary information.

Cost Allocation Key Flexfield

- You can only define one structure per business group for this flexfield.
- You can control the levels at which users can enter cost information by using the flexfield qualifiers.
- You must define a structure name for this flexfield before you can define a business group.
- A number of windows in Oracle HRMS check for the existence of a valid flexfield structure for Cost Allocation. You must define at least one segment for your Cost Allocation flexfield.

Collective Agreement Grades (CAGR) Key Flexfield

- You can create any number of structures for this flexfield.

  Important: If you are using the Italian legislation, do not create new structures for this flexfield. You must use the predefined structure, IT_CAGR, and you must not make changes to it. Otherwise, you may be unable to enter collective agreement grades for your assignments.

- You can define up to 20 segments within each structure. Each segment refers to a grade factor that is available as part of the grade structure.
- You must check the Allow Dynamic Inserts check box when defining the structure of this flexfield.
- You do not need to define any structures for the Collective Agreement Grades flexfield before you can use Oracle HRMS.
- You link each structure to a collective agreement in the Agreement Gradeswindow. The reference grades entered in this window are recorded against this combination.
- You can enter values for each of the defined grade factors as part of each reference grade in the Agreement Grades window.

Flexfields: Open Key Window Profile Option

The way in which key flexfield windows open is controlled by the Flexfields:Open Key Window profile option. If this option is set to Yes, the flexfield window automatically pops open when the user navigates to the field. If it is set to No, users can open the flexfield by choosing Edit Field from the Edit menu or pressing CTRL+L. The default is Yes.

User Definable Descriptive Flexfields

The predefined fields in Oracle HRMS windows are designed to meet your core information requirements. However, like all enterprises, you may have special requirements that are best met by fields that you design yourself. Oracle HRMS provides a flexible mechanism called *descriptive flexfields* to enable you to add fields to windows.

All window blocks in which you can enter information contain a user definable descriptive flexfield. You decide in which blocks you want to record additional information. Each user definable descriptive flexfield has 20 segments that you can define. After you define a descriptive flexfield, Oracle HRMS treats the segments as part of the window.

The following figure illustrates the distinctive appearance of descriptive flexfields. When users click in a flexfield that you have set up, or choose Edit Field from the Edit menu, a window opens, displaying up to 20 *segments* that you have defined.

The way in which descriptive flexfield windows open is controlled by the Flexfields:Open Descr Window profile option. If this option is set to Yes, the flexfield window automatically pops open when the user navigates to the field. If it is set to No, users can open the flexfield by choosing Edit Field from the Edit menu or pressing CTRL+L. The default is Yes.

Segments

For each segment, you can define:

- Its prompt
- The type of data it can contain
- The values a user can enter

You can provide a list or range of valid values. You also control the size and display characteristics of each segment and the order in which the segments appear.

Types of Descriptive Flexfield Segments

You can define two types of descriptive flexfield segments:

- Global segments, which always appear in the window.
- Context-sensitive segments, that appear only when a defined context exists. You can prompt the user to provide the context, or you can provide the context automatically from a reference field in the same block.

  For example, a segment holding information about an employee's disability might appear only when the Disabled field is checked.

  Important: Some descriptive flexfields appear in more than one window. For example, the *Additional Evaluation Details* flexfield appears in the Job Evaluation window and the Position Evaluation window.

  Check all of the windows that use a descriptive flexfield before you define any of the segments. This is especially important if you intend to make the flexfield context sensitive to another field. You must ensure that the reference fieldis present in all of the windows that use the flexfield.

See: Descriptive Flexfield List, page 3-12 for a full list of user definable descriptive flexfields in Oracle HRMS.

Descriptive Flexfield List

The following table lists all the user definable descriptive flexfields in Oracle HRMS.

Descriptive Flexfield Title	Window Title	Database Items
Additional Absence Details	Absence Detail, View Absence History	ABSENCES_<SEGMENT_NAME>
Additional Absence Type Details	Absence Attendance Type	ABSENCE_TYPES_<SEGMENT_NAME>
Additional Address Details	Address, Applicant Entry Contact	PERSON_ADDRESSES_<SEGMENT_NAME>

Descriptive Flexfield Title	Window Title	Database Items
Additional Application Details	Applicant Entry, Application, Terminate Applicant	APPLICATIONS_<SEGMENT_NAME>
Additional Appraisal Details		
Additional Appraisal Template Details		
Additional Assessment Group Details		
Additional Assessment Type Details		
Additional Assessment Details	Medical Assessment	
Additional Assignment Details	Applicant Entry, Application, Assignment, Assignment History	ASSIGNMENTS_<SEGMENT_NAME>
Additional Assignment Status Details	Secondary Statuses	
Additional Balance Type Details	Balance (Oracle Payroll only)	
Additional Benefit Contribution Details	Benefit Contributions (US only)	
Additional Booking Details	Applicant Interview, Book Events, Employee Review, Event Bookings	
Additional Budget Details	Budget	

Descriptive Flexfield Title	Window Title	Database Items
Additional Budget Values Details		
Additional Budget Version Details	Budget	
Additional Calendar Information	Budgetary Calendar (Oracle Payroll)	
Additional Candidate Information	Election	
Additional Career Path Details	Career Path Names	
Additional Checklist Item Details		
Additional COBRA Benefit Details	COBRA Benefits (US only)	
Additional COBRA Coverage Details	COBRA Coverage (US only)	
Additional COBRA Payment Details	COBRA Payment (US only)	
Additional COBRA Status Details	COBRA Status (US only)	
Additional Collective Agreement Details	Collective Agreements	
Additional Coll. Agreed Grades Details	Agreement Grades	
Additional Competence Details		
Additional Competence Element Details		

Descriptive Flexfield Title	Window Title	Database Items
Additional Constituency Details	Election	
Additional Contact Relationship Details	Contact	CONTACTS_<SEGMENT_NAME>
Additional Contract Details	Contract	
Additional Delivery Method Details		
Additional Deployment Factor Details	Work Choices, and Position Transaction (Work Choices tabbed region)	
Additional Disability Information	Disabilities	
Additional Election Details	Election	
Additional Element Entry Information	Adjust Balance (Oracle Payroll only), Element Entries, View Element Entry History for Employee	
Additional Element Link Information	Element Link (Oracle Payroll)	
Additional Element Type Details	Element (Oracle Payroll)	
Additional Establishment Att Details		
Additional Establishment Details		
Additional Evaluation Details	Job, Position	

Descriptive Flexfield Title	Window Title	Database Items
Additional Event Details	Applicant Interview, Employee Review, Event Bookings	EVENTS_<SEGMENT_NAME>
Additional Grade Details	Grade	GRADES_<SEGMENT_NAME>
Additional Hierarchy Details	Generic Hierarchy	
Additional Incident Details	Work Incident	
Additional Job Details	Job	JOBS_<SEGMENT_NAME>
Additional Letter Details	Letter	
Additional Location Details	Location	
Additional Node Details	Generic Hierarchy	
Additional Objectives Details		
Additional Organization Information	Organization	
Additional Organization Payment Method Details	Organizational Payment Method (Oracle Payroll)	
Additional Organization Structure Details	Organization Hierarchy	
Additional Organization Unit Details	Organization	ORGANIZATION_<SEGMENT_NAME>
Additional Participants Details		
Additional Pay Scale Information	Pay Scale	

Descriptive Flexfield Title	Window Title	Database Items
Additional Pay Rate Details	Grade Rate, Scale Rate	
Additional Payroll Action Details (Oracle Payroll)		
Additional Payroll Details	Payroll	PAYROLLS_<SEGMENT_NAME>
Additional Performance Ratings Details		
Additional Period Information	Budgetary Calendar, Period Dates (Payroll form)	
Additional Period of Placement Details	End Placement	
Additional Period Type Information	Period Types	
Additional Person Analysis Details	Special Information, List People By Special Information	
Additional Personal Details	Applicant Entry, Contact, People, People Folder	PEOPLE_<SEGMENT_NAME>
Additional PPM Details	Personal Payment Method	
Add'l Person Type Usage Details	Person Type Usage	
Additional Position Details	Position, Find Positions (Mass Move form)	POSITION_<SEGMENT_NAME>

Descriptive Flexfield Title	Window Title	Database Items
Additional Position Structure Details	Position Hierarchy	
Additional Previous Employer Details	Previous Employment	
Additional Previous Job Details	Previous Employment	
Additional Previous Job Usage Details	Previous Job	
Additional Qualification Details		
Additional Qualification Types		
Additional Rating Level Details		
Additional Rating Scale Details		
Additional Recruitment Activity Details	Recruitment Activity	RECRUITMENT_ACTIVITIES_<SEGMENT_NAME>
Additional Requirement Details	Job, Position	
Additional Requisition Details	Requisition and Vacancy	
Additional Role Details	Supplementary Roles	
Additional Salary Administration Details	Salary Administration	
Additional Salary Basis Details	Salary Basis	
Additional Standard Holiday Absence Details		

Descriptive Flexfield Title	Window Title	Database Items
Additional Subjects Taken Details		
Additional Succession Planning Details		
Additional Telephone Number Details	Phone Numbers	
Additional Template Details	People Management Configurator (Template Object)	
Additional Vacancy Details	Requisition and Vacancy	
Additional Valid Grade Details	Job, Position	
Additional Version Details	Generic Hierarchy	
Additional Year Information	Budgetary Calendar	
Assignment Extra Information	Extra Assignment Information	
Extra Job Info Details	Extra Job Information	
Extra Location Info Details	Extra Location Information	
Extra Person Info Details	Extra Person Information	
Extra Position Info Details		
Extra Previous Job Details	Previous Employment	
Further Candidate Information	Election	
Further Election Information	Election	

Descriptive Flexfield Title	Window Title	Database Items
Proposal Component Addl Info		
Review Addl Information		
Salary Survey Additional Information		
Survey Line Addnl Information		
Survey Mapping Add Info		

Descriptive Flexfields and Address Styles

Oracle HRMS supplies two predefined descriptive flexfields to hold address information in different styles for different countries. These are:

- the **Personal Address Information descriptive flexfield**: This holds the address information of your employee or applicant.
- the **Location Address descriptive flexfield**: This holds the address information of your locations.

Oracle HRMS holds the addresses of people and locations separately to enable you to record different information for tax reporting.

You can use these descriptive flexfields to add new address styles or to change the styles included in Oracle HRMS.

> **Important:** If you change the predefined styles, your changes are overwritten when you upgrade Oracle HRMS. If you add new styles, your changes may be overwritten if new startup data contains address styles for these countries.

Address Styles

Address styles vary between countries, so Oracle HRMS provides descriptive flexfields that use *context-sensitive* segments to hold each line of an address. The Address Styles Flexfields table below details the title of the flexfield, its location and where it is used.

Address Style Flexfields in Oracle HRMS

Title	Table Name	Window Title
Personal Address Information	PER_ADDRESSES	Address, Applicant Entry
Location Address	HR_LOCATIONS	Location, Organization

The available address styles are defined as the contexts for these flexfields. There are two types of address style:

- International
- Local

Address styles are provided as startup data in these flexfields. If you require additional address styles, you need to define a new context and segments.

International Address Style

This style provides basic validation of address data. Oracle HRMS provides international address styles for many countries. This style can be used for both location and personal addresses. International address styles are named *territory_code*_GLB. For example, the Australian international address style is AU_GLB.

Territory codes can be found in the FND_TERRITORIES table.

If no international address style is available for your country, you can use the generic style (GENERIC) to enter your address information. This generic structure provides no validation.

Local Address Style

This style provides full validation of address data and is set up by a localization team. Where a local address style exists, it can usually be used for both location and personal addresses. Local address styles are named *territory_code*. For example, the Australian local address style is AU.

Where a local address style exists and the Business Group uses the legislation code for that country, the local address style is displayed as the default in the appropriate address entry window. Where no local address exists, the international style is the default.

US and Canadian users: the local address style for the US or Canada is only available when you have Vertex geocodes data installed.

Developer Flexfields

Oracle HRMS supplies developer key flexfields and developer descriptive flexfields. Your localization team has defined these flexfields, as required, to meet the specific legislative and reporting needs of your country.

The protected developer key flexfields are the Soft Coded Legislation key flexfield and the Bank Details key flexfield.

Of the developer descriptive flexfields, all except six are protected and cannot be amended. The remaining six have Extra Information Types that you can use to configure your application.

See: Extra Information Types (EITs), page 3-30

The following table lists the developer descriptive flexfields, including EITs.

Developer Descriptive Flexfields in Oracle HRMS

Title	Table Name	Window Title
Extra Job Information (EIT)		
Extra Location Information (EIT)		
Extra Person Information (EIT)		
Extra Position Information (EIT)		
Extra Previous Job Information	PER_PREVIOUS_JOB_EXTRA_INFO	Previous Employment
Further Absence Information (Additional Absence Detail Information)	PER_ABSENCE_ATTENDANCES	Absence Detail
Further Assignment Information (EIT)		
Further Budget Values Details		
Further Candidate Information	PER_ELECTION_CANDIDATES	Election

Title	Table Name	Window Title
Further Canvas Properties	HR_CANVAS_PROPERTIES_B	People Management Configurator (Canvas Object)
Further Collective Agreement Information	PER_COLLECTIVE_AGREEMENTS	Collective Agreements
Further Competence Element Information	PER_COMPETENCE_ELEMENTS	
Further Competence Element Outcomes Information	PER_COMP_ELEMENT_OUTCOMES	
Further Competence Information	PER_COMPETENCES	Competencies
Further Competence Outcomes Information	PER_COMPETENCE_OUTCOMES	
Further Contact Relationship Information	PER_CONTACT_RELATIONSHIPS	Contacts
Further Contract Information (Datetracked)	PER_CONTRACTS_F	Contracts
Further Contribution History Information		
Further Disability Information (Datetracked)	PER_DISABILITIES_F	Disabilities
Further Election Information	PER_ELECTIONS	Election
Further Element Information (Datetracked)	PAY_ELEMENT_TYPES_F	Element
Further Element Entry Information (Datetracked)	PAY_ELEMENT_ENTRIES_F	Element Entry
Further Establishment Information	PER_ESTABLISHMENTS	Schools/Colleges

Title	Table Name	Window Title
Further Form Properties	HR_FORM_PROPERTIES	People Management Configurator (Form Object)
Further Item Properties	HR_ITEM_PROPERTIES	People Management Configurator (Item Object)
Further Job Information	PER_JOBS	Job
Further Medical Assessment Information	PER_MEDICAL_ASSESSMENTS	Medical Assessment
Further Payment Method Information (Datetracked)	PAY_ORG_PAYMENT_METHODS_F	Organizational Payment Method
Further Payroll Information (Datetracked)	PAY_ALL_PAYROLLS_F	Payroll
Further Period Details	PER_TIME_PERIODS	Payroll Periods
Further Period of Service Information (Add'l Periods of Service Information)	PER_PERIOD_OF_SERVICE	Terminate
Further Person Information (Datetracked)	PER_PEOPLE_F	People, Applicant Entry
Further Previous Employer Information	PER_PREVIOUS_EMPLOYERS	Previous Employment
Further Previous Job Information	PER_PREVIOUS_EMPLOYERS	Previous Employment
Further Previous Job Usage Information	PER_PREVIOUS_JOB_USAGES	Previous Job
Further Qualification Information	PER_QUALIFICATIONS	Qualifications
Further Role Information	PER_ROLES	Supplementary Roles
Further Subject Information	PER_SUBJECTS_TAKEN	Qualifications

Title	Table Name	Window Title
Further Tab Page Properties	HR_TAB_PAGE_PROPERTIES_B	People Management Configurator (Tab Page Object)
Further Template Properties		People Management Configurator
Further Window Properties	HR_WINDOW_PROPERTIES_B	People Management Configurator (Window Object)
Further Work Incident Information	PER_WORK_INCIDENTS	Work Incidents
Org Developer DF		
State Tax Limit Rate Information		
Statutory Transaction Information		
Tax Signup Developer DF		

Your localization team determines which of these flexfields are required for your legislation, and what segments they should contain. The legislation of your business group determines which developer descriptive flexfields are displayed. This means that if your enterprise uses multiple business groups that have different legislations, different developer descriptive flexfields are displayed for business groups of each legislation.

> **Caution:** Do not attempt to alter the definitions of the protected flexfields. These definitions are a fundamental part of Oracle HRMS. Any change to them may lead to errors in the operating of the system.
>
> It is possible that Oracle HRMS will use other segments of these flexfields in the future. Therefore, do not add segments to any protected flexfield, as this may affect your ability to upgrade your system in the future.

Soft Coded Legislation Key Flexfield

This key flexfield holds legislation-specific information. The legislation of your business group determines the flexfield structure that you see.

Each localization team defines a flexfield structure, if required, which enables you to

enter information specific to your legislation at the employee or contingent worker assignment level.

Bank Details Key Flexfield

This flexfield holds legislation-specific bank account information. The legislation of your business group determines the flexfield structure that you see. Each localization team defines a flexfield structure that allows you to record the bank account information relevant to your legislation. You enter this information in the Organizational Payment Method window and Personal Payment Method window.

Creating Key Flexfield Database Items

The *Create Key Flexfield DB Items* process turns data in key flexfields into database items that Oracle FastFormula can access. It is essential to run this process whenever you create or change the Grade, Job, Position, or People Group key flexfield definitions.

Submit the process from the Submit Requests window.

To create key flexfield database items:

1. Run the *Create Key Flexfield DB Items* process.

   Run this process whenever you create or change these key flexfield definitions.

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

Creating Descriptive Flexfield Database Items

You can use descriptive flexfield segments in QuickPaint reports and formulas if there are database items for these segments.

See Descriptive Flexfield List, page 3-12 for a list of flexfields for which you can create database items.

Submit the process from the Submit Requests window.

To create descriptive flexfield database items:

1. Run the *Create Descriptive Flexfield DB Items* process.

   Run this process whenever you create or change these descriptive flexfield definitions.

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

   Note: The process can only create database items for global segments. It does not create database items for context-sensitive

segments.

Changing Default National Address Styles

National address styles, both international and local, are held and configured in the Personal Address Information and the Location Address descriptive flexfields. You can configure these styles using the Descriptive Flexfield Segments window.

You cannot construct any flexfield segment value sets with:

- Profile options, $PROFILE$
- Previous segment values, $FLEX$
- Block.field references
- Security rules

> **Note:** You must ensure the Personal_Address or Location_Address protected flag is off.

To change the address style for any country, redefine those segments you do not want to use. Then define new segments to record your own information.

To alter an existing address style:

1. Enter Oracle Human Resources in the application field.
2. Enter Personal Address Information or Location Address in the title field as appropriate.
3. Run the query.
4. Uncheck the Freeze Flexfield Definition check box.

   Note: Read the warning.

5. Select the address style for your country.

   Note: Both international and local address styles are included in the list of context field values.

6. Click the segments button.

This opens a new window with the segment and value set information for the selected address style.

7. Update the segments.

   Note: You must make the Country segment mandatory. Do not change the validation on any segment as this may invalidate existing data.

8. Save your work, and open the Descriptive Flexfield Segments window. Make sure any new segments are enabled, and displayed.

9. Check the Freeze Flexfield Definition check box.

10. Choose the Compile button.

    When compilation is complete, exit your current login session, then log in again to see your updated styles.

To add an address style:

1. Enter Oracle Human Resources in the application field.

2. Enter Personal Address Information or Location Address in the title field as appropriate.

3. Run the query.

4. Uncheck the Freeze Flexfield Definition check box.

   Note: Read the warning.

5. Choose New from the File menu.

6. Enter the country code in the code and name fields.

7. Enter a description and select the Segments button.

8. Define the segments.

   Note: You can only use the columns provided by Oracle HR for your segments.

9. Save your work.

Note: Make sure any new segments are enabled. You can choose whether segments are displayed or not.

10. Check the Freeze Flexfield Definition check box.

11. Choose the Compile button.

    When compilation is complete, exit your current login session. Then log in again to see your updated styles.

Extra Information Types

Extra Information Types (EITs)

Extra Information Types are defined using descriptive flexfields. You can set up any number of different EITs for:

- Location
- Job
- Position
- Person
- Assignment
- Organization
- Element types
- Previous Job
- Contacts
- Role

> **Note:** EITs for Organization are different because you can define which organization classification the EIT is available for.

For each EIT you can define up to 30 fully validated segments of information (or 20 for organizations).

> **Note:** Oracle HRMS provides some predefined EITs. You may add your own information types, but you must **not** change the definitions of the delivered EITs.
>
> For information about predefined EITs for positions, see: Position Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

Unlike the usual descriptive flexfields, EITs are child entities with separate tables to hold the information you enter. This means that you can have multiple instances of an EIT for each main record. When you define the EIT, you can specify whether you want to allow multiple instances. With the exception of organizations, EIT data is viewed and

entered in a separate window which you can task flow.

The windows for all the EITs have the common look and feel of all the descriptive flexfield windows. This means that you can use your new EITs as soon as you save your definitions. Since flexfield definitions are preserved through upgrades, EITs do not require expensive recoding of configured forms with each new release.

Key Flexfield Combinations

EITs are very similar to Special Information Types (SITs). For analyzing people's attributes and job requirements, Oracle enables you to choose whether to set up extra or special information types, or both. Both types of information use flexfields to define the structure and validation of their segments.

However, SITs are stored in a key flexfield combination table where the combination of segments must be unique - a feature of all key flexfields. EITs are stored in a descriptive flexfield table where the combination of segment values do not need to form a unique key.

This means that EITs have performance advantages in large scale, or global implementations where you may want to transfer large volumes of information between separate installations.

Dates and EITs

EITs are not datetracked. Even if the parent entity, for example People, is datetracked, the extra information is not. However, if you want to track changes to specific EITs you can define date segments for Start and End Dates and use multiple rows of the EIT to track changes.

EITs and Security

Both special and extra information types use CustomForm and task flow security to restrict access to information. This means that you can restrict access to the information types as part of a specific user process. For example, in a "Transfer to the UK" process you might want to enter additional UK specific information. You could design your user process to include a "UK Info" window as part of the task flow and restrict the window to display only the UK information type.

To provide extra security for EITs, you must associate each EIT with the responsibilities that should have access to the information. For example. you might record details of an extended leave of absence in an EIT for an assignment and provide access only to managers who need to know.

Restricting Access to Extra Information

You can restrict access to EITs using a combination of the following:

- **Menus and task flows :** Without the EIT window a user cannot see or change any extra information for the entity.

- **CustomForm and task flows**: This restricts EITs to specific user processes.

  For example, at the person level you might define EITs to hold medical details, security information and information required for working in other countries. In this situation you might want to create two task flows, the first with a button for entering only medical details and the second with a button for entering the other types of extra information

- **Responsibility level security**: For each responsibility, you must select the EITs to be viewed. CustomForm and task flow restrictions provide additional security. You might specify that a responsibility can access an EIT, but users of this responsibility will not be able to view the extra information unless they have access to a window that displays it.

  Note: This security does not apply to extra information on organizations.

Example Script for Registering Extra Information Types (EITs)

If you have created new organization EITs, you must create a SQL script to insert a row for each EIT into the relevant information type table. This is known as registering your information type. When you create your script, you can use the sample script provided as a guide.

Note: If you have created non-organization EITs, you use the concurrent process Register Extra Information Types (EITs) instead.

See: Register Extra Information Types (EITs), page 3-40

Example Script to Register EITs

```
WHENEVER SQLERROR EXIT FAILURE ROLLBACK
REM /* $Header: example.sql $ */
REM ===========================================
REM SQL Script File Name : example.sql
REM Description : This sql script inserts information
REM 1) HR_ORG_INFORMATION_TYPES
REM 2) HR_ORG_INFO_TYPES_BY_CLASS
REM ========================================
WHERE not exists (SELECT 1
--1) Insert into HR_ORG_INFORMATION_TYPES:---
-- Note different parameter value for single and multi-row
-- Note different parameters for this EIT
INSERT INTO HR_ORG_INFORMATION_TYPES
(ORG_INFORMATION_TYPE
,DESCRIPTION
,DESTINATION
,DISPLAYED_ORG_INFORMATION_TYPE
,FND_APPLICATION_ID
,LEGISLATION_CODE
,NAVIGATION_METHOD
)
SELECT
'<Organization EIT Name>'
,'<Description>'
,NULL
,'<Display value on the Organization form>'
,NULL
,'<legislation code US/GB/etc>'
,'<GM for multi-row - GS for single>'
FROM sys.dual
WHERE not exists (SELECT 1
FROM HR_ORG_INFORMATION_TYPES
WHERE ORG_INFORMATION_TYPE = '<Organization EIT Name>');
INSERT INTO HR_ORG_INFO_TYPES_BY_CLASS
(ORG_CLASSIFICATION
,ORG_INFORMATION_TYPE
,MANDATORY FLAG)
SELECT
'<Check lookup value for classification HR_BG for Business Group>'
, '<Organization EIT Name>'
,'N'
FROM sys.dual
WHERE not exists (SELECT 1
FROM HR_ORG_INFO_TYPES_BY_CLASS
WHERE ORG_INFORMATION_TYPE = '<Organization EIT Name>'
and
ORG_CLASSIFICATION = '< HR_BG for Business Group>');
/
COMMIT;
EXIT;
```

Setting Up Extra Information Types (Excluding Organization EITs)

The following steps explain how to set up Extra Information Types (EITs) to use in Oracle HRMS.

Note: EITs for organizations are set up differently. See: Setting Up Extra Information Types for an Organization Classification, page 3-36

1. In the Descriptive Flexfield Segments window, select the relevant descriptive flexfield by title (for example, Extra Job Information). The descriptive flexfields available are:
   - Extra Location Information (30 Segments)
   - Extra Job Information (30 Segments)
   - Extra Position Information (30 Segments)
   - Extra Person Information (30 Segments)
   - Extra Element Information (30 Segments)
   - Further Assignment Information (30 Segments)
   - Previous Extra Job Information (30 Segments)
   - Contact Extra Information (30 Segments)
2. Unprotect the relevant extra information type using the Register Descriptive Flexfield window. You must do this before you can query the flexfield in the Descriptive Flexfield window.
3. Create a new record in the Context Field Values region of the Descriptive Flexfield window and enter the name of your new Information Type in the Code field. As these are context-sensitive descriptive flexfields, enter INFORMATION_TYPE in the Reference Field.
4. Enter the segment values and compile in the same way as a standard descriptive flexfield.

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

   Important: There are some predefined EITs in Oracle HRMS. These definitions are a fundamental part of your Oracle HRMS installation and any change to them may lead to errors in the operation of the system. Do not attempt to alter the definitions of these developer flexfields or to add other segments to them. It is possible that Oracle will use other segments of these flexfields in the future. Any changes you make may affect your ability to upgrade your system in the future.

For US Federal users: Do not prefix EIT definitions with GHR_US. This prefix is reserved for the predelivered US Federal definitions.

5. Reset the protection in the Register Descriptive Flexfield window so the flexfield remains a protected descriptive flexfield.

6. Run the Register Extra Information Types (EITs) concurrent program to insert a row for each EIT into the relevant Information Type table. The following table lists the tables for each EIT.

Extra Information Type Tables

EIT	Table
Location	HR_LOCATION_INFO_TYPES
Job	PER_JOB_INFO_TYPES
Position	PER_POSITION_INFO_TYPES
Person	PER_PEOPLE_INFO_TYPES
Assignment	PER_ASSIGNMENT_INFO_TYPES
Previous Job	PER_PREV_JOB_INFO_TYPES
Contact	PER_CONTACT_INFO_TYPES

Important: Oracle applications use a standard 2- or 3-character product prefix followed by an underscore to name the predefined EITs. To avoid current and future naming conflicts, you should adopt a different naming convention for your Extra Information Types; for example CUSTOM_EXPAT_TAXABILITY.

7. Use the Information Types Security window to set up responsibility level access to EITs.

See: Setting Up Extra Information Types Against a Responsibility, page 3-38

Your EIT will now be available anyone using the specified responsibilities. If you want to set up further security using CustomForm and task flow, continue with the next step.

8. Use the Form Customization window to restrict access to specific EITs within the appropriate windows.

   See: Configuring a Window using CustomForm, page 3-241

9. Use the Define Task Flow Nodes window to define new nodes for any CustomForm restrictions you have set up.

   See: Defining Task Flow Nodes, page 3-148

10. Use the Define Task Flow window, or use Oracle Workflow, to define and change task flows to include any new nodes you have set up.

    See: Creating Task Flows Using Forms, page 3-148

    See: Creating Task Flows Using Workflow, page 3-152

Setting Up Extra Information Types for an Organization Classification

To add Extra Information Types (EITs) to an organization classification:

1. Define a new organization classification. You do not need to do this if you are setting up an EIT for a classification that already exists.

   Note: To define a new classification, enter a new value for the Lookup type ORG_CLASS in the Lookup Values window.

2. Define the new EIT. See: Entering Table Values, page 3-57

   - Unprotect the Org Developer DF using the Register Descriptive Flexfield window. You must do this before you can query the flexfield on the Descriptive Flexfield window

   - Add the new structure for the EIT to the Org Developer DF descriptive flexfield using the Descriptive Flexfield Segments window. The structure must have as its context the name of the extra information type, and as this is a context sensitive descriptive flexfield you must enter C_ORG_INFORMATION_CONTEXT in the Reference Field. Compile in the same way as a standard descriptive flexfield.

   - Reset the protection, so the flexfield remains a protected descriptive flexfield.

3. You need to enter rows into the following tables:

   - HR_ORG_INFORMATION_TYPES

   - HR_ORG_INFORMATION_TYPES_TL

Oracle recommends that you write a script to carry out the HR_ORG_INFORMATION_TYPES_PKG.INSERT_ROW procedure to create the rows in the base table and translation table. The procedure uses the following parameters:

Parameter	Column name	Description
X_ORG_INFORMATION_TYPE	ORG_INFORMATION	Name of the type (same as DDF context).
X_DESCRIPTION	DESCRIPTION	Description of the extra information type.
X_DISPLAYED_ORG_INFORMATION_TP	DISPLAYED_ORG_INFORMATION_TYPE	The Name of the Extra Information Type displayed in the Organization window.
X_NAVIGATION_METHOD	NAVIGATION_METHOD	"GS" for single row, a user can only enter one extra information row for each organization. Alternatively, "GM" for multi row, a user can enter more than one row for each organization.
X_LEGISLATION_CODE	LEGISLATION_CODE	Optionally, you can enter a legislation code to restrict to which business groups the EIT is available. If you do not enter a legislation code it will be valid for all business groups.
X_DESTINATION	DESTINATION	This is set to Null.
X_FND_APPLICATION_ID	FND_APPLICATION_ID	ID of application.
X_CREATION_DATE	CREATION_DATE	Creation date.
X_CREATED_BY	CREATED_BY	Created by (user ID).
X_LAST_UPDATE_DATE	LAST_UPDATE_DATE	Date of last update.

Parameter	Column name	Description
X_LAST_UPDATED_BY	LAST_UPDATED_BY	User ID of last person to update table.
X_LAST_UPDATE_LOGIN	LAST_UPDATE_LOGIN	ID for the login session

4. Specify for which organization classifications this EIT should be available.

   To do this, enter a row into HR_ORG_INFO_TYPES_BY_CLASS as shown in the following table:

Column name	Description
ORG_CLASSIFICATION	ORG_CLASS lookup code
ORG_INFORMATION_TYPE	Org extra information type
MANDATORY_FLAG	Y (for Yes) or N (for No)

Setting Up Extra Information Types For a Responsibility

Before a user can access an Extra Information Type (EIT), you must attach the EIT to the user's responsibility. If you do not link your information types to a responsibility, users cannot access your information types.

> **Note:** You can select EITs for any legislation to add to a responsibility in this window. Users of the Oracle HRMS professional user interface are restricted to seeing the information types for the legislation of the business group to which they have access. Self-service users are restricted to seeing information types for the legislation of the record they are working with.

Use the Information Type Security window to link EITs to a responsibility.

> **Note:** If you have created new document types for the Documents of Record function, you also use the Information Type Security window to link these document types to a responsibility.

See: Creating Document Categories, Subcategories, and Types, page 3-103

To set up EITs for a responsibility:

1. Select the name of the responsibility to which to attach the EIT.

   Note: The responsibilities displayed belong to the same application as the responsibility that you have used to display the Information Type Security window, for example, Human Resources. If you want to link an EIT to a responsibility from another application, for example, Advanced Benefits, you must access the Information Type Security window from an Advanced Benefits responsibility. If necessary, add the Information Types Security function to your responsibility.

   Oracle HRMS displays a list of EITs already associated with the responsibility you have chosen.

2. Enter or select the new EIT you want to link to the responsibility.

3. Save your work.

To copy EITs between responsibilities:

1. Query the responsibility from which you want to copy.

2. Select the Copy Responsibility button

3. Enter the responsibility to which you want to copy.

   This responsibility is then displayed with the new EITs.

4. Save your work.

Entering Extra Information

You enter extra information in one or more windows available from the main window (such as the Job window). Your system administrator may have created configured versions of the extra information windows so that you can use each version for one information type only.

Your implementation team may have defined one or more types of extra information for you to record for:

- Locations

- Jobs
- Positions
- People
- Assignments
- Organization
- Element types
- Previous Job
- Contacts

To enter extra information:

1. Enter the type of extra information, for example Job Category.

   Note: To access extra information in the Organization window select the Others button in the Organization Classifications region.

2. Click in the Details field to display the extra information fields you can enter.
3. Enter your extra information.
4. Save your work.

Running the Register Extra Information Types (EITs) Process

Use this process to register any new Extra Information Types (EITs) (excluding Organization EITs).

You run this process from the Submit Requests window.

To run the Register Extra Information Types (EITs) process:

1. In the Name field, select Register Extra Information Types (EITs).

   The Parameters window opens.

2. In the Table Name field, select the table in which the EIT will be registered.
3. In the Information Type field, select the extra information type created in the Descriptive Flexfield Segments window. The value in the Table Name field determines which information types are available.

4. In the Multiple Rows field, specify whether multiple occurrences of the same infotype can exist.

5. In the Legislation Code field, select the legislation code for the information type. The default value is the legislation code of the current business group.

   Note: If the information type is global, the legislation code value should be Null.

6. Optionally, enter a description for information type.

7. Choose the Submit button.

User-Defined Tables

User-Defined Tables

You may need to set up your own tables in your Oracle HRMS system, to hold data such as wage codes, shift differentials, or the amounts of certain deductions. You can set up all the tables you require using the Table Structure window. Using Oracle FastFormula, you can write simple formulas for validating entries made in table columns.

Notice that the Oracle HRMS user-defined tables are different from the database tables of the Oracle Relational Database Management System. When you set up a user table, you define the rows as well as the columns, like a matrix. For example, you could set up a table showing bonus amounts (the column) against years of service (the rows).

> **Important:** You *do not* use the Table Structure window to set up tables holding information on medical, dental or vision benefit plans (benefits with the benefits classification Medical, Dental or Vision).
>
> The Oracle HRMS database includes a special table, the Benefits Table, already set up to hold information on benefit plans with coverage levels, and the employee and employer contributions at each level. To enter information into this table you use the Benefit Contributions window.
>
> See: Establishing Plan Coverage and Default Contributions (Basic Benefits), *Oracle HRMS Compensation and Benefits Management Guide*
>
> See: Setting Up Basic Benefits, *Oracle HRMS Compensation and Benefits Management Guide*

Entering and Accessing Table Values

To enter values in tables, you use the Table Values window. Table entries and rows are both datetracked, so you can delete existing entries or rows, and add new ones, as of an effective date.

Oracle HRMS provides the GET_TABLE_VALUE function to access table values. You can write formulas that include calls to this function, perhaps for QuickPaint inquiries. Also, MIS personnel can write PL/SQL statements that call this function, to include in the code for a form or report process, for example.

Row Types for Payroll Tables

Tables set up to hold deduction amounts are called *payroll tables*. You need a payroll

table when the amount of a deduction varies in accordance with a factor such as employee age, pay or job class.

To initiate a deduction with the amount rule Payroll Table, you must establish a *row type*. The formula for the deduction uses the row type to help determine which row of the table to go to for each employee's deduction amount. Your startup data includes three predefined row types: Age Range, Salary Range and Job Class. You can set up any additional types you require.

Predefined User Tables

Oracle HRMS supplies the following tables, already defined using the Table Structure window:

- Canada Tables, page 3-43
- Denmark Tables, page 3-46
- Finland Tables, page 3-46
- France Tables, page 3-48
- Hong Kong Tables, page 3-49
- Hungary Tables, page 3-50
- Ireland Tables, page 3-50
- Mexico Tables, page 3-51
- Russia Tables, page 3-52
- Singapore Tables, page 3-53
- Spain Tables, page 3-54
- UAE Tables, page 3-54
- US Tables, page 3-54

Canada Tables

COMPANY WORK SCHEDULES Table

This table has several commonly-used work schedules already entered in it, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday.

Example

Employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column.

Example

The header for the column holding the first schedule is *1 Schedule: 8-8-8-8-8-0-0*.

SHIFT DIFFERENTIALS Table

This table has no data already in it, but is ready for your data entry. Its rows hold the shift designators Day, Eve, Night and Split, representing the normal shifts employees work, and its columns have the same headings, for entry of differentials. You can add to or change the shift designators as necessary.

To look at examples of differentials entries, suppose day shift employees receive one and one-half times their regular pay when temporarily working the evening shift, twice their regular pay for the night shift, and three times their regular pay for the split shift. You enter 1.5, 2.0 and 3.0 as the differentials for day shift workers.

Example Shift Differentials Table

Time Period	D	E	N	S
Day	--	1.5	2.0	3.0

WAGE RATES Table

This table has no data in it when you receive your system, but is ready for your data entry. Its rows hold rate codes, and its single column holds the rate matching each code. This example holds codes for rates associated with the operation of different types of equipment:

Example Wage Rates Table

Rate Code	Rate
FL (forklift)	6.80
A3 (crane A3)	8.20

Rate Code	Rate
A7 (crane A7)	9.00

Maximum Assessable Earnings

Wages defined as subject to the workers compensation premium are referred to as assessable wages. Each year, the workers' compensation board for each province and territory defines the maximum amount of employee wages that are deemed to be assessable. Use this table to enter the maximum assessable amount for each province or territory.

Manitoba HAPSET Rate

In Manitoba, health and post secondary premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED, as defined in taxability rules. The percentage rate used by the employer may be a flat percent, or vary based on the total amount of wages paid to all employees in the province. It may also involve an exemption. Use this table to enter the rate at which the premiums are calculated for each threshold of earnings. The thresholds are provided in a list of values. You must enter the associated rate for each threshold, including a rate of zero for any exempt earnings.

Newfoundland/Labrador HAPSET Rate

In Newfoundland, health and post secondary premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED as defined in taxability rules. Use this table to enter the rate at which the premiums are calculated. The thresholds are provided in a list of values. You must enter the associated rate for each threshold, including a rate of zero for any exempt earnings.

Quebec Health Services Fund Tax Rate

In Quebec, health premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED as defined in taxability rules. The percentage paid by the employer may vary based on the total amount of wages paid to all employees in the province. Use this table to enter the rate at which the premiums are to be calculated.

Ontario EHT Rate

In Ontario, health premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED as defined in taxability rules. The percentage paid by the employer may vary based on the total amount of wages paid to all employees in the province. Use this table to enter the rate at which the premiums are

calculated for each threshold of earnings. The thresholds are provided in a list of values. You must enter the associated rate for each threshold, including a rate of zero for any exempt earnings.

Default Vacation Bank

The Vacation Bank table holds the values that reflect a length of service band and the associated percentage at which the person would accumulate the vacation amount they are owed by an employer. For example, some provinces legislate that the minimum a person can accrue is 4% of their vacationable wages (as defined in the taxability rules for the province). Depending on the province, this may increase to 6% after a number of years of service. You must define each of these 'length of service' bands in the vacation bank table in order for employees to accrue the correct amount. The Default Vacation Bank table holds a value of 4% for all lengths of service. If you have different rules, you can create a new user table to hold the applicable values.

Denmark Tables

Earned Notice Period Table

The table DK_EARNED_NOTICE_PERIOD maps the length of service against the earned notice period. For example, an employee whose length of service is six months has an earned notice period of one month. Oracle HRMS references this table to retrieve the appropriate earned notice period value for an employee assignment.

Company Mileage Rates Table

The table DK_COMPANY_MILEAGE_RATES enables you to use your own mileage rates, if they are different from the official rates. You can record the mileage rate against the mileage range.

Finland Tables

Regional Membership Table

The table FI_REGIONAL_MEMBERSHIP maps the place of residence and territory code with any of the three regional memberships, Nordic, EU, and non-EU. Oracle HRMS references this table for income tax calculation and other statutory deductions.

Employee Pension Insurance Table

The table FI_EMPLOYEE_PENSION_PCT maps the percentage deduction of the employee pension insurance to the employee's age. Oracle HRMS references this table for calculating the pension insurance deduction accurately.

Employer Unemployment Insurance Table

The table FI_EMPLOYER_UNEMP_INS_PCT maps the percentage of employer unemployment insurance against the employer's yearly income. Oracle HRMS references this table for deducting the employer's contribution towards unemployment insurance.

Court Order Table

The table FI_COURT_ORDER_USER_TAB maps the monthly, fortnightly, weekly, and daily protected portions of an employee's income against the number of dependents an employee has. Oracle HRMS references this table for deducting the court order amount from the employee's income after excluding the protected portion.

Car Benefit Rates for Age Group A Table

The table FI_CAR_BENEFIT_RATES_GROUP_A contains the applicable benefit rates for cars that belong to the mobilization period between the years 2002 and 2004 (age group A). Oracle HRMS references this table to calculate the taxable value of the car benefit for cars in this age group.

Car Benefit Rates for Age Group B Table

The table FI_CAR_BENEFIT_RATES_GROUP_B contains the applicable benefit rates for cars that belong to the mobilization period between the years 1992 and 2001 (age group B). Oracle HRMS references this table to calculate the taxable value of the car benefit for cars in this age group.

Car Benefit Rates for Age Group C (Full Benefit) Table

The table FI_CAR_BENEFIT_RATES_GROUP_C_FULL contains the applicable benefit rates for cars that belong to the mobilization period prior to the year 1992 (age group C). Oracle HRMS references this table to calculate the value of the car benefit for cars in this age group.

Car Benefit Rates for Age Group C (Taxable Benefit) Table

The table FI_CAR_BENEFIT_RATES_GROUP_C_TAX contains the applicable benefit rates for cars that belong to the mobilization period prior to the year 1992 (age group C). Oracle HRMS references this table to calculate the taxable value of the car benefit for cars in this age group.

Tax Days Table

The table FI_TAX_DAY_MAPPING maps the number of tax days against the different payroll frequencies. Oracle HRMS references this table to retrieve the standard number of tax days applicable for a payroll period.

Postal Code Table

The table FI_POSTAL_CODE maps the postal codes to the corresponding Finnish and Swedish post office names. Oracle HRMS references this table to display the correct post office information.

France Tables

Validation Table

The table PQH_FR_VALIDATIONS keeps the details regarding the validations available for a person. The Services Validation Process references this table when validating the previous services of the employee.

Validation Events Table

The table PQH_FR_VALIDATION_EVENTS keeps the details regarding the events for a particular validation. The Services Validation Process references this table to know the events history of the validation process.

Validation Periods Table

The table PQH_FR_VALIDATION_PERIODS keeps the period details for a particular validation of an individual. The Services Validation Process references this table while calculating the period of service.

Role Information Types Table

The table PQH_ROLE_INFO_TYPES keeps the details regarding the committee information types and is used for information purposes.

Role Extra Information Table

The table PQH_ROLE_EXTRA_INFO keeps the details regarding the extra information recorded against the role information types. These details are used for information purposes.

Termination

The termination reasons table FR_TERM_REASON_ADS_STATUS_CODE includes the reasons for the termination. Oracle HRMS references this information for generating the absence report.

Absence

The table FR_ABS_CATG_ADS_STATUS _CODE contains the information on the status of absence.

The table FR_ABS_CATG_ADS_ABS_CODE includes the information on absence categories provided by Oracle HRMS.

Oracle HRMS references these tables for the absence report.

Statutory information for maternity, paternity, and adoption leave duration is maintained in the seeded user defined table FR_MAP_DURATION.

Work Incident

The table FR_WORK_INC_ADS_ABS_CODE keeps the information on the type of work incident. Oracle HRMS references this table.

Legal Guaranteed Income

The table FR_LEGI_RATE_BANDS contains the information on the seniority of the person as of the parent absence date, the percentage rates and days to be paid at each of the rates. Oracle Payroll references this table while processing sick pay.

The table FR_LEGI_WAITING_DAYS provides information on the number of waiting days for the processing of legal guaranteed income. Oracle Payroll references this table.

IJSS

The table FR_IJSS_NON_OCCUP_RATES_MAX keeps the information on the social security benefit rates for non-occupational sicknesses.

The table FR_IJSS_OCCUP_RATES_MAX keeps the information on the social security benefit rates for occupational sicknesses and social security ceiling.

Oracle Payroll references these tables while processing sick pay.

> **Note:** There are further predefined tables supplied with Oracle HRMS for France that are used in certain statutory reports.
>
> See: User Defined Tables, *Oracle HRMS Enterprise and Workforce Management Guide*
>
> See: User Defined Tables Used by the Bilan Social, *Oracle HRMS Enterprise and Workforce Management Guide*

Hong Kong Tables

When the Mandatory Provident Fund (MPF) Board makes changes to the limits for a particular contribution, Oracle Payroll provides legislative updates that include the new limit information.

MPF Limits Table

The MPF limits table, MPF_RI_LIMITS, contains the MPF upper and lower limits for

each valid time period.

Oracle Payroll references this table when processing MPF contributions.

Hungary Tables

Company Work Patterns

The table PQP_COMPANY_WORK_PATTERNS has several commonly-used work schedules already entered in it, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday.

Example
Employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column.

Example
The header for the column holding the first schedule is *1 Schedule: 8-8-8-8-8-0-0*.

Ireland Tables

PRSI Tables

The PRSI formula uses the following predefined tables with community flag to calculate which PRSI employee or employer deduction to use in a payroll. Community is a scheme run by the Irish Government to encourage employers to employ people for work. They are allowed certain number of people in their workforce, and in return the employer receives a reduced PRSI rate.

- IE Class A Community Employee Monthly
- IE Class A Community Employer Monthly
- IE Class A Community Employee Weekly
- IE Class A Community Employer Weekly

The PRSI formula uses the following predefined tables to calculate which PRSI employee or employer deduction to use in a payroll:

- IE Class A, B, C, D, H, J, K and S Employee Monthly
- IE Class A, B, C, D, H, J, K and S Employer Monthly
- IE Class A, B, C, D, H, J, K and S Employee Weekly

- IE Class A, B, C, D, H, J, K and S Employer Weekly

IE PRSA Certificates Rates

The Pension Deduction formula uses this table to calculate Personal Retirement Savings Account (PRSA) contributions. The table holds the age-related limit for tax exempted PRSA contribution that is a percentage of the employee's net relevant earnings.

IE BIK Annualized Mileage

The BIK Company Vehicle formula uses this table to calculate the mileage percentage for the period being processed. The column holds the annualized mileage percentage and the rows hold the lower and upper limits of mileage.

Company Work Patterns

This table provides several commonly-used work schedules, and you can add more. A work schedule shows the hours employees normally work each day from Monday through Sunday. Employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off. Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column. The header for the column holding the first schedule is 1 Schedule: 8-8-8-8-8-0-0.

Mexico Tables

COMPANY WORK SCHEDULES Table

This table provides several commonly-used work schedules, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday.

Example

Employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column.

Example

The header for the column holding the first schedule is *1 Schedule: 8-8-8-8-8-0-0*.

Contract Table

The PQP_CONTRACT_TYPES table is used for IDW calculation and is a part of the historic rates infrastructure. Rows are created automatically as a part of the IDW calculation. Users would not normally see these.

ISR Credit to Salary Tables

The following tables store ISR credit-to-salary information for tax calculation:

- ISR Credit to Salary_Week
- ISR Credit to Salary_Month

ISR Rates Tables

The following tables store ISR tax rate information for tax calculation:

- ISR Rates_Week
- ISR Rates_Month
- ISR Rates_Annual

ISR Subsidy Tables

The following tables store ISR tax subsidy rate information for tax calculation:

- ISR Subsidy_Week
- ISR Subsidy_Month
- ISR Subsidy_Annual

Tax Subsidy Percentage Table

This table has no data already in it but is ready for your data entry. It provides the means to record and track your yearly tax subsidy percentage.

Work Risk Insurance Percentage Table

This table has no data already in it but is ready for your data entry. It provides the means to record and track your yearly work risk insurance percentage.

Russia Tables

Flexfield Segment Mappings Table

The RU_FLEXFIELD_SEGMENT_MAPPINGS table maps the value of a key flexfield segment to the respective segment number. This table stores information about the Grade Code segment of the Grade Key Flexfield, and the Foreign Language Code and Foreign Language Name segments of the Competence Key Flexfield.

Oracle HRMS references this table to define the grade of an employee. It also uses the

table to define the code and name of the foreign language in which an employee is competent.

Singapore Tables

When the CPF Board makes changes to the rates for a particular contribution, Oracle Payroll for Singapore provides legislative updates that include the new rate information.

CPF Rates

The CPF rates tables, CPF_SCHEDULE_A to CPF_SCHEDULE_N, include the CPF rates that are payable for each employee, depending on the employee type, salary range, and age range.

Oracle Payroll references this table when processing involuntary CPF deductions.

FWL Rates

The FWL_RATES table holds the rates that are used to calculate an employer's Foreign Workers Levy (FWL) liability. The table includes the codes that determine the type of work performed by the employee, both skilled and unskilled, and the rate payable for that type of employee, depending on whether they worked for the entire month or just part of it.

Oracle Payroll references this table when processing FWL Employer Liability deductions.

Community Fund Rates

The following rate tables provide the monthly contribution rate for each community fund, depending on the employee's salary:

- SG_COMM_FUND_CDAC
- SG_COMM_FUND_ECF
- SG_COMM_FUND_MBMF
- SG_COMM_FUND_SINDA

Oracle Payroll references this table when processing involuntary Community Fund deductions.

Exchange Rate Types

The EXCHANGE_RATE_TYPES table includes conversion rate type information. Oracle Financials references this table.

Spain Tables

Company Work Patterns

The table PQP_COMPANY_WORK_PATTERNS has several commonly-used work schedules already entered in it, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday.

Example
Employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column.

Example
The header for the column holding the first schedule is *1 Schedule: 8-8-8-8-8-0-0*.

Contract Key Relation Table

The ES_CONTRACT_KEY_RELATION table maps the relationship between the contract key, status, type, subtype, and start reason. Oracle HRMS references this table for social security information.

UAE Tables

City Validation Table

The UAE_CITY_VALIDATION table stores the list of cities that are valid for a particular Emirate.

Area Validation Table

The UAE_AREA_VALIDATION table holds the list of areas that are valid for a particular city.

Marital Status Table

The UAE_MARITAL STATUS table stores values used to map the codes required by Dubai Naturalization and Residency Department (DNRD) to the codes in the core lookup.

US Tables

COMPANY WORK SCHEDULES Table

This table has several commonly-used work schedules already entered in it, and you

can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday.

Example
Employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column.

Example
The header for the column holding the first schedule is *1 Schedule: 8-8-8-8-8-0-0*.

GTL PREMIUMS Table

For use in Oracle Payroll, this table holds the cost of Group Term Life insurance premiums per $1,000 of coverage by age range, as maintained in the IRS Uniform Premiums table. The table rows hold age ranges, and its single column holds the premium for each $1,000 of coverage for each age range.

Oracle provides you with updates to the GTL Premiums table, which your system administrator applies.

The predefined imputed earnings GTL Imputed Income references this table in its processing.

SHIFT DIFFERENTIALS Table

This table has no data already in it, but is ready for your data entry. Its rows hold the shift designators Day, Eve, Night and Split, representing the normal shifts employees work, and its columns have the same headings, for entry of differentials. You can add to or change the shift designators as necessary.

To look at examples of differentials entries, suppose day shift employees receive one and one-half times their regular pay when temporarily working the evening shift, twice their regular pay for the night shift, and three times their regular pay for the split shift. You enter 1.5, 2.0 and 3.0 as the differentials for day shift workers.

Example Shift Differentials Table

Time Period	D	E	N	S
Day	--	1.5	2.0	3.0

The predefined earnings types Regular Wages and Shift Pay reference this table in their processing in Oracle Payroll.

WAGE RATES Table

This table has no data in it when you receive your system, but is ready for your data entry. Its rows hold rate codes, and its single column holds the rate matching each code. This example holds codes for rates associated with the operation of different types of equipment:

Example Wage Rates Table

Rate Code	Rate
FL (forklift)	6.80
A3 (crane A3)	8.20
A7 (crane A7)	9.00

Oracle Payroll's predefined earnings types Regular Wages, Overtime, and Shift Pay reference this table in their processing.

Setting Up User Tables, Columns and Rows

You set up user tables in the Table Structure window.

To set up the structure of a table:

1. Set your effective date to the date from which you want the table's row labels to take effect.
2. Enter the table name.
3. For the table's match type, select Match or Range. Select Match if each row is for one item, such as one job or one code. Select Range if each row is for a range of numeric values, such as an age range or a pay range.
4. If the match type is Match, select Date, Number or Text as the Key Units of Measure, depending on whether entries in the rows are dates, numbers, or alphanumeric text.

   If the table's match type is Range, the Key Units of Measure automatically becomes Number.
5. Enter the row label as the Row Title.

   For example, if the table rows refer to rate codes, an appropriate row title would be

Rate Code. If the rows refer to age ranges, you might use the title Age Range.

6. Save your work, and choose the Columns button to go to the Columns window.

Column Setup

7. Enter labels for the table columns in the Name field.

> **Note:** To add a new column to a table that already exists, place the cursor on the name of the column after which you want to enter the new column name, and choose Insert Record from the Edit menu to obtain a clear field.

8. If you are using formula validation for a column's entries, select the name of the validation formula for the column.

9. Save your work and close the window.

Row Setup

10. In the Table Structure window, choose the Rows button to go to the Rows window.

11. If the match type of the table is Match, enter the label for each table row in the fields under the heading Exact.

    If the match type of the table is Range, enter numbers representing the lower and upper boundary of each row's range.

12. In the Sequence fields, you can optionally enter a number for each row label to determine the order in which it appears on a list in the Table Values window. Logical sequencing of row labels helps users enter table values rapidly and accurately.

13. When you are finished, save your work and close the window. Your table is now set up and ready to receive entries into its columns.

Entering Table Values

If you have set up user-defined tables, you can enter and maintain values in the Table Values window.

You can access table values from any formula used for input-value validation, payroll calculation or definition of skip-rules, assignment sets or QuickPaint reports. You can access this information using the *GET_TABLE_VALUE* function.

> **Note:** The system administrator can create configured versions of the

Table Values window so that you use each version for one user table only.

To enter values into table columns:

1. Set your effective date to the date from which you want the entries to take effect.
2. Query the table name.
3. With the cursor in the Column Name field, use the up and down arrows to locate the name of the column in which you want to make entries.
4. In the Values region, select each row for which you want to make an entry. You select rows in the Exact field or the Lower Bound field, depending on the match type of the table.
5. For each row, make the appropriate entry in the Value field. For numeric values, you must use '.' (dot) as the decimal separator to ensure the use of accurate table values in payroll calculations.
6. Save your work.

Lookups

Lookups

Lookups provide lists of valid values for certain items of information. This has two key advantages:

- It ensures that all users use the same terminology, which makes it easier to inquire and report on the information.
- It speeds up data entry because you can enter just enough to identify the value, and the system completes the entry.

In Oracle HRMS, a list of values is called a *lookup type*. Each value comprises a code, a meaning, and sometimes, a legislative tag. For example:

Lookup Type	Code	Meaning	Tag
MAR_STATUS	M	Married	
	S	Single	
	R	Registered Partner	+NL
	DP	Domestic Partner	-FR, AU

The codes are used internally; users do not see them. There is a maximum of 250 lookups for each lookup type.

Your localization team uses the Tag column to define the lookup codes that are used by each localization. In this example, the Married and Single codes are visible to all legislations. The Registered Partner code is visible to the Dutch legislation only. The code for Domestic Partner, however, is visible to all legislations *except* France and Australia.

Predefined Lookup Types

A number of lookup types are included in Oracle HRMS. Some contain codes as startup data. You can never delete these codes, but you can change their meaning. For some lookup types, you can also disable the codes that are supplied. Your ability to disable codes and add new codes is determined by the *access level* of the lookup type:

- **User** - You can add codes and you can disable supplied codes.

- **Extensible** - You can add new codes, but you cannot disable supplied codes because the system uses them.

- **System** - You can neither add codes nor disable supplied codes. You can only change the meaning or description of supplied codes.

See User and Extensible Lookups, page 3-60 for a list of the predefined lookup types with an access level of User or Extensible.

You can also create your own lookup types in the lookup type window. These all have an access level of User.

Global and Local Lookup Types

If you are using Security Groups Enabled security, lookup types may be either global or local:

- Global lookup types are available to all business groups

- Local lookup types are only available to the business group/security group in which they are created.

Local lookups can be implemented in either of the following ways:

- You can create an override. This means that you retain the global name for the lookup type, but supply local values appropriate for your business group. The extent to which you can do this is determined by the access level for the lookup type.

- You can create an entirely new lookup type with lookup values that are only applicable to your local business group.

When you connect to any business group you will therefore have access to each of the following:

- The global lookup types and values

- Local overrides to the global lookup values

- Local lookup types and values

User and Extensible Lookups

The following table shows the field and legislation for user and extensible lookups.

Field	Lookup	Legislation
Category (absence)	ABSENCE_CATEGORY	All
Reason (for absence)	ABSENCE_REASON	All
Account Type (for bank details)	ACC_TYPE	All
Categories (for activities, programs, packages)	ACTIVITY_CATEGORY	All
Successful attendance (for activity based events)	ACTIVITY_SUCCESS_CRITERIA	All
User Status (for an activity)	ACTIVITY_USER_STATUS	All
Address Type	ADDRESS_TYPE	All
AK Web Region Codes	AK_WEB_REGION_CODES	All
Reason (for application assignment status)	APL_ASSIGN_REASON	All
Type (event type for applicant)	APL_EVENT_TYPE	All
Type (interview type for applicant)	APL_INTERVIEW_TYPE	All
Reason (for secondary assignment status)	APL_SEC_ASSIGN_REASON	All
Appraisal and Assessment Status (appraisal and assessment on SSHR)	APPRAISAL_ASSESSMENT_STATUS	All
Types of appraisal processed by appraisal functionality	APPRAISAL_SYSTEM_TYPE	All

Field	Lookup	Legislation
Appraisal and Assessment Type (appraisal and assessment on SSHR)	APPRAISAL_TYPE	All
	AT_PROVINCE	All
Activity (for work incident)	AT_WORK_FLAG	All
Australian Tax Office Codes	AU_ATO_OFF	Australia
Australian Direct Entry Indicator	AU_DE_IND	Australia
Australian Direct Entry Transaction Code	AU_DE_TRN_CDE	Australia
State (Australian addresses)	AU_STATE	All
Years until eligible for long service leave on termination	AU_TERM_LSL_ELIGIBILITY_YEARS	Australia
Balance Type Category	BACKFEED_BT_CATEGORY	All
Check Type Category	BACKFEED_PD_CHECK_TYPE	All
Bank account name	BANK_ACCOUNT_NAME	All
Bank account number	BANK_ACCOUNT_NUMBER	All
Bank account type	BANK_ACCOUNT_TYPE	All
Bank branch	BANK_BRANCH	All
Bank name	BANK_NAME	All

Field	Lookup	Legislation
Bargaining Unit (for assignment)	BARGAINING_UNIT_CODE	All
Bank name	BE_BANK	Belgium
City (Belgian addresses)	BE_CITY	Belgium
Contract Category	BE_CONTRACT_CATEGORY	Belgium
Disciplinary Action	BE_DISCIPLINARY_ACTION	Belgium
Disciplinary Body	BE_DISCIPLINARY_BODY	Belgium
Employee Coding	BE_EMPLOYEE_CODING	Belgium
Employee Type	BE_EMPLOYEE_TYPE	Belgium
Ending Reason	BE_ENDING_REASON	Belgium
Misdemeanour Type	BE_MISDEMEANOUR_TYPE	Belgium
Organization Language	BE_ORGANIZATION_LANGUAGE	Belgium
Reduced Charges Category	BE_REDUCED_CHARGES_CATEGORY	Belgium
RSZ Category	BE_RSZ_CATEGORY	Belgium
Starting Reason	BE_STARTING_REASON	Belgium
Yes/No	BE_YES_NO	Belgium
Action Type	BEN_ACTN_TYP	All
Activity Type	BEN_ACTY_TYP	All
Benefits Balance Usage	BEN_BNFTS_BAL_USG	All
Certification Type	BEN_BNF_CTFN_TYP	All

Field	Lookup	Legislation
	BEN_CMP_ENRT_ACTN_TYP	All
Compensation Category	BEN_COMP_TYP	All
Type	BEN_CRT_ORDR_TYP	All
Delivery Medium	BEN_DLVRY_MED	All
Delivery Method	BEN_DLVRY_MTHD	All
	BEN_DLVRY_SCHED_INFO	All
Dependent Coverage Certification Type	BEN_DPNT_CVG_CTFN_TYP	All
Enrollment Certification Type	BEN_ENRT_CTFN_TYP	All
Life Event Occurred Date Code	BEN_EVAL_DET	All
Change Event	BEN_EXT_CHG_EVT	All
Format Mask	BEN_EXT_FRMT_MASK	All
Operator	BEN_EXT_OPER	All
Run Status	BEN_EXT_STAT	All
Condition (Optional) Where	BEN_EXT_TTL_COND_OPER	All
Field	BEN_FIELD	All
	BEN_FILE_CTL_TTL_TYP	All
	BEN_FILE_DTA_TYP	All
Type	BEN_FILE_RCRD_TYP	All

Field	Lookup	Legislation
	BEN_FILE_TYP	All
	BEN_FILE_UPDT_TYP	All
	BEN_FL_TM_PT_TM	All
Type	BEN_GD_R_SVC_TYP	All
	BEN_GNDR	All
Health Service	BEN_HLTH_CARE_SVC_TYP	All
	BEN_INFO_SRC	All
	BEN_INTRFC_TYP	All
	BEN_MED_CNTNT_TYP	All
	BEN_MED_FMT_TYP	All
Non-Monetary UOM	BEN_NNMNTRY_UOM	All
Option Type	BEN_OPT_TYP	All
Organization Roles	BEN_ORG_ROLE_TYP	All
Reason	BEN_OVRID_RSN	All
Designation code	BEN_PCP_DSGN	All
Program Group	BEN_PGM_GRP	All
Program Type	BEN_PGM_TYP	All
	BEN_PIN_PRPS	All
Product	BEN_PRDCT	All
Type	BEN_PRMRY_CARE_PRVDR_TYP	All

Field	Lookup	Legislation
Primary Funding Method	BEN_PRMRY_FNDG_MTHD	All
	BEN_PRTN_CTFN_TYP	All
Payment Schedule	BEN_PYMT_SCHED	All
QDRO Payment Distribution	BEN_QDRO_DSTR_MTHD	All
Administrative Code	BEN_REGN_ADMIN	All
Regulatory Plan Type	BEN_REGY_PL_TYP	All
Regulatory Purpose	BEN_REGY_PRPS	All
Type	BEN_REIMBMT_CTFN_TYP	All
	BEN_RESND_RSN	All
	BEN_RMBT_CTFN_TYP	All
Purpose	BEN_RPTG_PRPS	All
Waive Coverage Reason	BEN_WV_CVG_RSN	All
Waive Participation Certification Type	BEN_WV_PRTN_CTFN_TYP	All
Waiving Participation Reason	BEN_WV_PRTN_RSN	All
Blood Type	BLOOD_TYPE	All
Source of student	BOOKING_SOURCE	All
Measurement Type (for budget)	BUDGET_MEASUREMENT_TYPE	All
Cash Analysis (for a cash payment)	CASH_ANALYSIS	All

Field	Lookup	Legislation
Census Metropolitan Area (Canada)	CA_CMA	Canada
Canadian Payment Association Codes	CA_DD_CPA_CODES	Canada
Element categories	CA_EMPLOYER_LIABILITIES	Canada
Select Form to be printed (Canada)	CA_FORM_NAME	Canada
Element categories	CA_INVOLUNTARY_DEDUCTIONS	Canada
Element categories	CA_PAYMENT	Canada
Province (Canadian addresses)	CA_PROVINCE	All
Element categories	CA_REGULAR_EARNINGS	Canada
Element categories	CA_SUPPLEMENTAL_EARNINGS	Canada
Element categories	CA_TAXABLE_BENEFITS	Canada
Element categories	CA_VOLUNTARY_DEDUCTIONS	Canada
Method	CERTIFICATION_METHOD	All
List of Swiss Cantons	CH_CANTON	All
	CHECKBOX	All
Checklist categories **Note:** Applicable to Release 12 only	CHECKLIST_CATEGORIES	All
Check item (on a checklist)	CHECKLIST_ITEM	All

Field	Lookup	Legislation
Status (of an item on a checklist)	CHECKLIST_STATUS	All
User friendly names for cheque/check-ordering SQL statement	CHEQUE_PROCEDURE	All
User friendly names for cheque/check-writing SRW2 reports.	CHEQUE_REPORT	All
Company Age (for salary surveys mappings)	COMPANY_AGE	All
Company Size (for salary surveys)	COMPANY_SIZE	All
Primary Evaluation Method	COMPETENCE_EVAL_TYPE	All
Consultation Type	CONSULTATION_TYPE	All
Consultation Result	CONSULTATION_RESULT	All
Competence Type	COMPETENCE_TYPE	All
Type (relationship of one person to another)	CONTACT	All
Contract End Reason	CONTRACT_END_REASON	All
Contract Start Reason	CONTRACT_START_REASON	All
Contract Status	CONTRACT_STATUS	All
Contract Status Reason	CONTRACT_STATUS_REASON	All
Contract Types	CONTRACT_TYPE	All
Contract Types (Belgium)	CONTRACT_TYPE_BE	Belgium

Field	Lookup	Legislation
Type (of MIX batch control total)	CONTROL_TYPE	All
Assignment Category	CWK_ASG_CATEGORY	All
Reason (for contingent worker assignment)	CWK_ASSIGN_REASON	All
Reason (for contingent worker secondary assignment status)	CWK_SEC_ASSIGN_REASON	All
Reason a student failed to successfully complete an event.	DELEGATE_FAILURE_REASON	All
User defined Type to categorize development events.	DEV_EVENT_TYPE	All
Bank Code	DE_BANK_CODE	Germany
Course Type (for qualifications)	DE_COURSE_TYPE	Germany
Establishment Type (for qualifications)	DE_ESTABLISHMENT_TYPE	Germany
Hereditary Title	DE_HEREDITARY_TITLE	Germany
Work Incident Status	DE_INCIDENT_STATUS	Germany
License Type (degree type)	DE_LICENSE_TYPE	Germany
Organization Link Type	DE_LINK_TYPE	Germany
Name Prefix	DE_PREFIX	Germany
Professional Title	DE_PROF_TITLE	Germany

Field	Lookup	Legislation
	DE_REGION	All
Category (of disability)	DISABILITY_CATEGORY **Note: For Polish users only**: This lookup contains relevant Polish codes. Therefore, you must not add further codes for disability categories to this lookup.	All
Reason (for disability)	DISABILITY_REASON	All
Status (of disability)	DISABILITY_STATUS	All
Disease Type	DISEASE_TYPE	All
Document Category	DOCUMENT_CATEGORY	All
Document Status (contract)	DOCUMENT_STATUS	All
Reason (for element entry)	ELE_ENTRY_REASON	All
Reason (for employee assignment)	EMP_ASSIGN_REASON	All
Employment Category	EMP_CAT	All
Type (of employee event)	EMP_EVENT_TYPE	All
Type (of interview for employee)	EMP_INTERVIEW_TYPE	All
Reason (for secondary assignment status)	EMP_SEC_ASSIGN_REASON	All
Employee Category	EMPLOYEE_CATG	Mexico

Field	Lookup	Legislation
Reason (for change in enrollment status)	ENROLLMENT_STATUS_REASON	All
	ES_PROVINCE	All
Ethnic Origin	ETH_TYPE	All
System (job or position evaluation system)	EVAL_SYSTEM	All
Measurement In (type for EVAL SYSTEM)	EVAL_SYSTEM_MEAS	All
User defined status for an event	EVENT_USER_STATUS	All
Type (of work pattern exception)	EXCEPTION_CATEGORY	All
Type (of finance line)	FINANCE_LINE_TYPE	All
Type (of formula)	FORMULA_TYPE	All
Bank Details	HR_DK_BANK_REGISTRATION	Denmark
Condition of Employment	DK_EMP_CATEGORY	Denmark
Employee Group	DK_EMP_GROUP	Denmark
Employee Type	DK_EMP_TYPE	Denmark
School Type	DK_ESTB_TYPE	Denmark
Labels (for Denmark)	DK_FORM_LABELS	Denmark
Employee Category	DK_EMP_CATEGORY	Denmark
Postal Code/Town	DK_POSTCODE_TOWN	Denmark
Union Membership	DK_UNION_MEMBERSHIP	Denmark

Field	Lookup	Legislation
Court Order Name	DK_COURT_ORDER_NAME	Denmark
Benefits Given	DK_BENEFIT	Denmark
Postal Code	DK_POSTAL_CODE	Denmark
Community Price Category	FI_COM_PRICE_CAT	Finland
Insurance Occupational Group	FI_INS_OCC_GRP	Finland
Electronic Report Method	FI_REPORTING_METHOD	Finland
Union Occupational Group	FI_EMPR_OCC_GRP	Finland
Pension Type	FI_PENSION_TYPES	Finland
Postal Code	FI_POSTAL_CODE	Finland
Activity Type	FR_ACTIVITY_TYPE	France
Address Suffix	FR_ADDRESS_SUFFIX	France
AGIRC/ARRCO	FR_AGIRC_ARRCO	France
Bank	FR_BANK	France
Contract Category	FR_CONTRACT_CATEGORY	France
Disability/COTOREP Code	FR_COTOREP_CODE	France
DADS Type	FR_DADS_TYPE	France
Department	FR_DEPARTMENT	France
Disciplinary Actions	FR_DISCIPLINARY_ACTION	France

Field	Lookup	Legislation
Education Status	FR_EDUCATION_STATUS	France
Employee Category	FR_EMPLOYEE_CATEGORY	France
Employee Status	FR_EMPLOYEE_STATUS	France
Employer Type	FR_EMPLOYER_TYPE	France
Employment Type	FR_EMPLOYMENT_TYPE	France
Ending Reason	FR_ENDING_REASON	France
Guaranteed ID	FR_GI_TYPES	France
Hiring Reason	FR_PQH_NONTIT_HIRE_REASON	France
Class of Illness	FR_ILLNESS_CLASS	France
Type of Illness	FR_ILLNESS_TYPE	France
Invalidity Category	FR_INVALIDITY_CLASS	France
Qualification Level	FR_LEVEL_OF_WORKER	France
Mandate Type	FR_MANDATE_TYPE	France
Type of Medical Examination	FR_MEDICAL_EXAMINATION_TYPE	France
Result of Medical Examination	FR_MEDICAL_RESULT	France
Military Service Status	FR_MILITARY_SERVICE_STATUS	France
Military Service Types	FR_MILITARY_SERVICE_TYPE	France
Misdemeanor Type	FR_MISDEMEANOUR_TYPE	France
NAF/APE Code	FR_NAF_CODE	France

Field	Lookup	Legislation
PCS Code	FR_PCS_CODE	France
Pension Code	FR_PENSION_CODE	France
Reason (in Person EIT-French Public Sector additional Seniority Details)	FR_PQH_ADDL_REASON	France
Activity (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_ACTIVITY	France
Army Body (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_BODY	France
Hierarchy (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_HIERARCHY	France
Rank (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_RANK	France
Bonification Type (in Person EIT-French Public Sector Bonification Details)	FR_PQH_BONIFICATION_TYPE	France
Level	FR_PQH_COMMITTEE_LEVEL	France
Type (Members)	FR_PQH_COMMITTEE_MEMBER_TYPE	France
Mention (in Qualification Type DDF)	FR_PQH_DIPLOMA_MENTION	France
Optional (in Qualification Type DDF)	FR_PQH_DIPLOMA_OPTION	France

Field	Lookup	Legislation
Specialty (in Qualification Type DDF)	FR_PQH_DIPLOMA_SPECIALITY	France
Sub-Specialty (in Qualification Type DDF)	FR_PQH_DIPLOMA_SUB_SPECIALITY	France
Relationship Type	FR_PQH_EXT_ORG_TYPE	France
Category (in Corps)	FR_PQH_GRADE_CATEGORY	France
Badge Name (in Ministry Awards SIT)	FR_PQH_MINISTRY_BADGE_NAME	France
Level (in Ministry Awards SIT)	FR_PQH_MINISTRY_LEVEL	France
Medal Name (in Ministry Awards SIT)	FR_PQH_MINISTRY_MEDAL_NAME	France
Order Name (in Ministry Awards SIT)	FR_PQH_MINISTRY_ORDER_NAME	France
Activity (in Organization EIT)	FR_PQH_ORG_ACTIVITY	France
Physical Share (in Assignment: Statutory Information)	FR_PQH_PHYSICAL_SHARE	France
Type of Service (in Person EIT-French Public Sector Soldier Details)	FR_PQH_TYPE_OF_ARMY_SERVICE	France
Event	FR_PQH_VALIDATION_EVENT	France
Previous Employer COTOREP Type	FR_PREVIOUS_COTOREP	France
Department	FR_REGION	France
Representative Type	FR_REPRESENTATIVE_TYPE	France

Field	Lookup	Legislation
Starting Reason	FR_STARTING_REASON	France
Types of French Training	FR_TRAINING_TYPE	France
Type of Worker	FR_TYPE_OF_WORKER	France
URSSAF Code	FR_URSSAF_CODE	France
Visa Status	FR_VISA_STATUS	France
Visa Type	FR_VISA_TYPE	France
Work Accident Code	FR_WORK_ACCIDENT_CODE	France
Work Accident Result	FR_WORK_ACCIDENT_RESULT	France
Type of Work Accident	FR_WORK_ACCIDENT_TYPE	France
Work Pattern	FR_WORK_PATTERN	France
Medical Service	FR_WORK_MEDICAL_SERVICE	France
Situation Sub Type	FR_PQH_STAT_SIT_SUB_TYPE	France
Situation Reason	FR_PQH_STAT_SIT_REASON	France
Type of Request	FR_PQH_STAT_SIT_RQST_TYPE	France
Label names for the BIAF report template	BIAF_LOOKUP_CODE	France
Label names for the DIF Statement report template	DIF_STMT_LOOKUP_CODE	France
Representative Body's method of funding	FUNDING_METHOD	All
Authority (for PAYE details)	GB_AUTHORITY	GB

Field	Lookup	Legislation
Bank Name	GB_BANKS	GB
Certificate (for element NI)	GB_CERTIFICATE	GB
Cheque/Check Style	GB_CHEQUE_REPORT	GB
County (UK addresses)	GB_COUNTY	GB
Pay day type	GB_PAY_DAY_TYPE	GB
Pension	GB_PENSION	GB
Allows users to to define valid SCON number for NI SCON input	GB_SCON	GB
Sequence (for the BACS process)	GB_SORT_SEQUENCE	GB
Names of Item Types for HR Summary Process	GSP_ITEM_TYPE	All
Names of Key Types for HR Summary Process	GSP_KEY_TYPE	All
Names of Restriction Types for HR Summary Process	GSP_RESTRICTION_TYPE	All
Hazard	HAZARD_TYPE	All
Area (Hong Kong addresses)	HK_AREA_CODES	Hong Kong
Rental/Passage Deduction Level	HK_DEDUCTION_LEVEL	Hong Kong
Leaving Reasons	HK_DEPARTURE_REASONS	Hong Kong
IR56B Origin	HK_IR56B_ORIGIN	Hong Kong

Field	Lookup	Legislation
IR56 Box Descriptions	HK_IR56_BOX_DESC	Hong Kong
MPF Voluntary Processing Rules	HK_MPF_PROC_RULE	Hong Kong
MPF Wage Base	HK_MPF_WAGE_BASE	Hong Kong
Nature of Quarters	HK_NATURE_OF_QUARTERS	Hong Kong
Overseas Payment Amount Known	HK_OVERSEAS_PAYMENT	Hong Kong
Returning to Hong Kong	HK_RETURN_TO_HK	Hong Kong
Tax Reporting Year	HK_TAX_YEAR	Hong Kong
Document Category	HR_ADI_DOCUMENT_TYPE	All
Date Posted	HR_APPLICATION_DATE	All
Reason for Deployment	HR_DEPLOYMENT_REASONS	All
Hire Date	HR_HIRE_DATE	All
Banks in Ireland	HR_IE_BANK	Ireland
Date Posted	HR_JOB_POSTED_DATE	All
HR Metalink Application	HR_METALINK_APPLICATION	All
Academic Title	HR_NL_ACADEMIC_TITLE	NL
Dutch Bank Details	HR_NL_BANK	NL
Dutch Cities	HR_NL_CITY	NL
Correspondence Language	HR_CORR_LANGUAGE	NL

Field	Lookup	Legislation
Dutch HR WAO Disability	HR_NL_DI_WAO	NL
Full Name Format	HR_NL_FULL_NAME_FORMAT	NL
Identification Certificate	HR_NL_ID_CERTIFICATE	NL
Job Level	HR_NL_JOB_LEVEL	NL
Nationality	HR_NL_NATIONALITY	NL
Province	HR_NL_PROVINCE	NL
Dutch Regions	HR_NL_REGIONS	NL
Royal Title	HR_NL_ROTAL_TITLE	NL
End Reasons for Social Health Insurance Report	HR_NL_SHI_END	NL
Special Title	HR_NL_SPECIAL_TITLE	NL
Field Labels	HR_FORM_LABELS	NL
Group	HR_WPM_GROUP	All
Unit of Measure	HR_WPM_MEASURE_UOM	All
Priority	HR_WPM_PRIORITY	All
Weighting	HR_WPM_WEIGHTING	All
Sector	NL_SECTOR	NL
Batch process used by OTM	HXT_BATCH_STATUS	All
Days of the week	HXT_DAY_OF_WEEK	All

Field	Lookup	Legislation
Process modes used by OTM	HXT_PROCESS_MODE	All
Benefit Type	IE_BENEFIT_TYPE	Ireland
Benefit Type	IE_BIK_ASSET_TYPE	Ireland
Benefit Type	IE_BIK_REPORTABLE_ITEM	Ireland
Calculation Option	IE_CALC_OPTION	Ireland
Cheque List Report Sort Option	IE_CHEQLIST_SORT	Ireland
Cheque Report	IE_CHEQUE_REPORT	Ireland
Colleges (Irish colleges)	IE_COLLEGES	Ireland
County (Irish addresses)	IE_COUNTY	Ireland
Text to be displayed on Irish specific field prompts	IE_FORM_LABELS	Ireland
Basis of Tax Assessment	IE_PAYE_ASSESS_BASIS	Ireland
Information Source	IE_PAYE_INFO_SOURCE	Ireland
Tax Basis	IE_PAYE_TAX_BASIS	Ireland
Postal Code	IE_POSTAL_CODE	Ireland
Contribution Class	IE_PRSI_CONT_CLASS	Ireland
Overridden Subclass	IE_PRSI_CONT_SUBCLASS	Ireland
Mode	IE_P35_SRS_MODE	Ireland
Qualification Type	IE_QUAL_TYPES	Ireland

Field	Lookup	Legislation
Incident Type	INCIDENT_TYPE	All
Industry (for salary survey)	INDUSTRY	All
Injury	INJURY_TYPE	All
Bank Name	IT_BANK	Italy
City (Italian addresses)	IT_CITY	Italy
Collective Agreement	IT_COLLECTIVE AGREEMENTS	Italy
Contract Type	IT_CONTRACT_TYPE	Italy
Text to be displayed on Italian specific field prompts	IT_FORM_LABELS	Italy
Employment Category	IT_EMP_CAT	Italy
Province (Italian addresses)	IT_PROVINCE	All
Trade Unions	IT_TRADE_UNIONS	Italy
Unemployment Insurance Codes	IT_UNEMPLOYMENT_INSURANCE_CODE	Italy
Unemployment Insurance Sub Codes	IT_UNEMPLOYMENT_INS_SUB_CODE	Italy
Extra Job Information	JOB_CATEGORY	All
Categories of Jobs	JOB_CATEGORIES	All
Representative Body's Jurisdiction	JURISDICTION	All
Reason (for leaving)	LEAV_REAS	All

Field	Lookup	Legislation
	LOCAL_BAL_FORM_NAME	All
Marital Status	MAR_STATUS	All
Marital Status (Belgium)	MAR_STATUS_BE	Belgium
Government Employment Sector	MX_HR_EMP_CAT	Mexico
MX_SOCIAL_SECURITY _SALARY_TYPE	Social Security Salary Type	Mexico
	MX_STATE	All
	MY_STATE	All
North American Industry Code for Canada	NAIC	All
Nationality	NATIONALITY	All
NI Unique Error or Warning	NI_UNIQUE_ERROR_WARNING	All
	NL_REGION	All
Reason	NPW_TERMINATION_REASONS	All
Region (New Zealand addresses)	NZ_COUNTIES	All
District of Origin	NZ_DISTRICT_OF_ORIGIN	New Zealand
Ethnic Origin	NZ_ETHNIC_ORIGIN	New Zealand
Tribal Group	NZ_TRIBAL_GROUP	New Zealand
Organization Type	ORG_TYPE	All
Class Begins	OTA_ENROLL_CLASS_DATE	All

Field	Lookup	Legislation
Use to which a work pattern is or may be put	PATTERN_PURPOSE	All
Type of checksum used for deductions batches	PAY_PDT_DED_CKSUM	All
Type of checksum used for earnings deductions batches	PAY_PDT_EARN_CKSUM	All
Type of checksum used for time entry batches	PAY_PDT_TIME_CKSUM	All
Category	PER_CATEGORIES	All
Communication delivery method, Report Method	PER_CM_MTHD	All
Cluster	PER_COMPETENCE_CLUSTER	All
FTE Capacity	PER_FTE_CAPACITY	All
Minimum Service	PER_LENGTHS_OF_SERVICE	All
Format Type	PER_NAME_FORMATS	All
Credit Type	PER_QUAL_FWK_CREDIT_TYPE	All
Field	PER_QUAL_FWK_FIELD	All
Level	PER_QUAL_FWK_LEVEL	All
Level Type	PER_QUAL_FWK_LEVEL_TYPE	All
Provider	PER_QUAL_FWK_PROVIDER	All
QA Organization	PER_QUAL_FWK_QA_ORG	All
Qualification Type	PER_QUAL_FWK_QUAL_TYPE	All
Sub-Field	PER_QUAL_FWK_SUB_FIELD	All

Field	Lookup	Legislation
Unit Standard Type	PER_QUAL_FWK_UNIT_STD_TYPE	All
Relocation	PER_RELOCATION_PREFERENCES	All
Status	PER_SUBJECT_STATUSES	All
Subject	PER_SUBJECTS	All
Work Duration	PER_TIME_SCALES	All
Tuition Method	PER_TUITION_METHODS	All
Address Type	ADDRESS_TYPE	Norway
Confederation Code	NO_CONFEDERATION_CODES	Norway
Labels (for Norway)	NO_FORMS_LABEL	Norway
Marital Status	MAR_STATUS	Norway
Nationality	NATIONALITY	Norway
Legal Employer	NO_LEGAL_EMP_SI_STATUS	Norway
Organization Class	ORG_CLASS	All
Contact Type	ORG_CONTACT_TYPES	Norway
SSB Position Code	HR_NO_POSITION_CODES	Norway
School Type	NO_ESTB_TYPES	Norway
Tax Municipality	NO_TAX_MUNICIPALITY	Norway
Tax Table Numbers	NO_TAX_TABLE_NO	Norway
Title	TITLE	Norway
US Country Code	PER_US_COUNTRY_CODE	USA

Field	Lookup	Legislation
I9 Status	PER_US_I9_STATE	USA
US Income Types	PER_US_INCOME_TYPES	USA
US Process Type	PER_US_PROCESS_TYPE	USA
US Residency Status	PER_US_RES_STATUS	USA
US Visa Categories	PER_US_VISA_CATEGORIES	USA
US Visa Types	PER_US_VISA_TYPES	USA
US Visit Code	PER_US_VISIT_CODE	USA
Work Hours	PER_WORK_HOURS	All
Work Schedule	PER_WORK_SCHEDULE	All
Rating	PERFORMANCE_RATING	All
Type	PHONE_TYPE	All
Reason (for grade step placement)	PLACEMENT_REASON	All
Position Family	POSITION_FAMILY	All
Status (of reserved position)	POSITION_RESERVED_STATUS	All
Status (of position)	POSITION_STATUS	All
Academic Rank	PQH_ACADEMIC_RANK	USA
Document Type (in Corps: Document Details)	PQH_CORPS_DOC_TYPE	FR
Type of Exam (in Corps: Entrance Exams)	PQH_CORPS_EXAM_TYPE	FR

Field	Lookup	Legislation
Filere (in Position and Corps HGRID)	PQH_CORPS_FILERES	FR
Way of Joining Corps (in Corps: Other Details)	PQH_CORPS_WAYS	FR
Requirements (in Corps: Other Details)	PQH_CORPS_WAYS_CRITERIA	FR
Value of SSHR Transaction Attribute (in Document Management)	PQH_CURRENT_PROPOSED	All
	PQH_PA_HGRID_NODE_IMAGE	All
	PQH_PA_HGRID_ROLLOVER_TEXT	All
Tenure Status	PQH_TENURE_STATUS	USA
Element Extra Information (rate type name)	PQP_RATE_TYPE	UK
Subtype (for previous employer)	PREV_EMP_SUBTYPE	All
Type (for previous employer)	PREV_EMP_TYPE	All
Student Enrollments Priority	PRIORITY_LEVEL	All
Type (of Professional Credits)	PROFESSIONAL_CREDIT_TYPE	All
Source of Proficiency Rating	PROFICIENCY_SOURCE	All
A label given to group events within a program	PROGRAM_MEMBERSHIP_GROUP	All

Field	Lookup	Legislation
Reason (for salary proposal)	PROPOSAL_REASON	All
Units (qualifying units for probation period)	QUALIFYING_UNITS	All
Basis	RATE_BASIS	All
Type (of recruitment activity, also used in application source)	REC_TYPE	All
Report Method	REPORT_METHOD	All
	RECON_STATUS	All
Type (of resource)	RESOURCE_TYPE	All
Reason (a resource is used by an activity)	RESOURCE_USAGE_REASON	All
Account Type	SG_ACCOUNT_TYPE	Singapore
Bank Code	SG_BANK_CODE	Singapore
Employer IRAS Category	SG_EMPLOYER_IRAS_CATEGORY	Singapore
Permit Category	SG_PERMIT_CATEGORY	Singapore
Race	SG_RACE	Singapore
Religion	SG_RELIGION	Singapore
Survey Age (for salary surveys)	SURVEY_AGE	All
Survey Company (for salary surveys)	SURVEY_COMPANY	All
Job Name (for salary surveys)	SURVEY_JOB_NAME	All

Field	Lookup	Legislation
Region (for salary surveys)	SURVEY_REGION	All
Seniority (for salary surveys)	SURVEY_SENIORITY	All
Reason (for terminating application)	TERM_APL_REASON	All
Prefix	TITLE	All
Uses Tobacco (for benefits)	TOBACCO_USER	All
Role (of trainer in event)	TRAINER_PARTICIPATION	All
Center (where event takes place)	TRAINING_CENTRE	All
Type (of unit for event pricing)	TRAINING_UNIT	All
Accrual Start	US_ACCRUAL_START_TYPE	All
Status of request for accommodation	US_ADA_STATUSES	All
Coverage Level (for medical, dental and vision benefit plans)	US_BENEFIT_COVERAGE	All
Status (of continued coverage)	US_COBRA_STATUS	All
Reason (for COBRA Termination)	US_COBRA_TERM_REASON	All
Category (within Earnings classification)	US_EARNINGS	All
Category (within Imputed Earnings classification)	US_IMPUTED_EARNINGS	All

Field	Lookup	Legislation
Category (within Information classification)	US_INFORMATION	All
Category (within Involuntary Deductions classification)	US_INVOLUNTARY_DEDUCTIONS	All
Job Groups	US_JOB_GROUPS	All
Filing Status for local income tax	US_LIT_FILING_STATUS	All
Exemption Reason (for excluding employee from New Hire report)	US_NEW_HIRE_EXCEPTIONS	All
Category (within Nonpayroll Payments classification)	US_PAYMENT	All
Category (of accrual plan)	US_PTO_ACCRUAL	All
Filing Status for state income tax	US_SIT_FILING_STATUS	All
State (US addresses)	US_STATE	All
Category (within Supplemental Earnings classification)	US_SUPPLEMENTAL_EARNINGS	All
Row Type (for Payroll Tables)	US_TABLE_ROW_TYPES	All
List of different instances of US Payroll Tax Balance reports	US_TAX_REPORT	All
Category (within Voluntary Deductions classification)	US_VOLUNTARY_DEDUCTIONS	All

Field	Lookup	Legislation
Position of WC surcharge (after experience modifications and after premium discount)	US_WC_SURCHARGE_POSITION	All
Category (of a vacancy, for use in HR Direct Access)	VACANCY_CATEGORY	All
Status (of a vacancy)	VACANCY_STATUS	All
Type of Reporting Organization	VETS_ORG_TYPE	All
User friendly names for cheque writing SRW2 reports	W2_BOX-14_USER_DEFINED	All
Name (of global used in workflow)	WF_GLOBAL	All
Availability Schedule	WORK_SCHEDULE	All
Aggregate Third Party Cheque Types	ZA_AGG_3RD_CHEQUE_REPORT	S Africa
Cheque Reports	ZA_CHEQUE_REPORT	S Africa
Credit Transfer Cheque Reports	ZA_CT_CHEQUE_REPORT	S Africa
Employment Equity Occupational Categories	ZA_EMP_EQ_OCCUPATIONAL_CAT	S Africa
Employment Equity Occupational Levels	ZA_EMP_EQ_OCCUPATIONAL_LEV	S Africa
Employment Equity Reports	ZA_EMP_EQ_REPORT_VALUES	S Africa
Language Preference	ZA_LANG_PREF	S Africa

Field	Lookup	Legislation
NQF Activity Names	ZA_NQF_ACTIVITY_NAMES	S Africa
NQF Chamber Names	ZA_NQF_CHAMBER_NAMES	S Africa
Race	ZA_RACE	S Africa
Religion	ZA_RELIGION	S Africa
RSC Regions	ZA_RSC_REGIONS	S Africa
Sort Order for Tax Certificates	ZA_TAXCERT_SORT	S Africa
Tax Area	CN_TAX_AREA	China
Social Insurance/PHF Contribution Area	CN_SIC_AREA	China
Notice Duration Unit	CN_DURATION_UNIT	China
Province/City/SAR (Personal Address Information and Location Address windows)	CN_PROVINCE	China
Hukou Location	CN_HUKOU_LOCN	China
Hukou Type	CN_HUKOU_TYPE	China
Health Status	CN_HEALTH_STATUS	China
Race/Ethnic Origin	CN_RACE	China
Highest Education Level	CN_HIGH_EDU_LEVEL	China
Enterprise Category	CN_ENTRP_CATEGORY	China
Archive Format	CN_FILE_ARCHIVE	China
Last Level	CN_MILITARY_LEVEL	China

Field	Lookup	Legislation
Last Rank	CN_MILITARY_RANK	China
Type of Exception	CN_PARTY_EXCEPTION	China
Party Status	CN_PARTY_STATUS	China
Party Type	CN_PARTY_TYPE	China
Type	CN_RDP_TYPE	China
Technical Title	CN_TECH_TITLE	China
Way to obtain Title	CN_TECH_WAY	China
Religion	GCC_RELIGION	For all GCC countries. Saudi Arabia, Kuwait
Employment Status	SA_EMPLOYMENT_STATUS	Saudi Arabia
City	SA_CITY	Saudi Arabia
Bank	SA_BANKS	Saudi Arabia
Bank	HU_BANKS	Hungary
County	HU_COUNTY	Hungary
Location Types	HU_LOCATION_TYPES	Hungary
Nationality	HU_NATIONALITY	Hungary
Form Labels	HU_FORM_LABELS	Hungary
Company Formation	HU_COMPANY_FORMATION	Hungary
Pension Provider	HU_PENSION_PROVIDERS	Hungary
Job Classification	HU_JOB_CLASSIFICATION	Hungary
Joining Reason	HU_JOINING_REASON	Hungary

Field	Lookup	Legislation
Military Rank	HU_MILITARY_RANK	Hungary
Civil Defense Organization	HU_CIVIL_DEFENCE_ORG	Hungary
Civil Local Department	HU_CIVIL_LOCAL_DEPT	Hungary
Civil Local Sub Department	HU_CIVIL_LOCAL_SUB_DEPT	Hungary
Civil Group	HU_CIVIL_GROUP	Hungary
Civil Sub Group	HU_CIVIL_SUB_GROUP	Hungary
Banks	ES_BANKS	Spain
Company Types	ES_COMPANY_TYPES	Spain
Province	ES_PROVINCE	Spain
Province codes	ES_PROVINCE_CODES	Spain
Form Labels	ES_FORM_LABELS	Spain
Identifier Type	ES_IDENTIFIER_TYPE	Spain
Epigraphs	ES_EPIGRAPHS	Spain
Contract Subtype	ES_CONTRACT_SUBTYPE	Spain
Contract Replacement Reason	ES_CONTRACT_REPLACEMENT_REASON	Spain
Worker Status	ES_WORKER_STATUS	Spain
Unemployment Status	ES_UNEMPLOYMENT_STATUS	Spain
Special Relationship Type	ES_SPECIAL_RELATIONSHIP_TYPE	Spain

Field	Lookup	Legislation
Contract Start Reason	ES_CONTRACT_START_REASON_UDT	Spain
Payment Key	ES_PAYMENT_KEY	Spain
Sub Payment Key (for Payment Key B)	ES_SUB_PAYMENT_KEY_B	Spain
Sub Payment Key (for Payment Key F)	ES_SUB_PAYMENT_KEY_F	Spain
Sub Payment Key (for Payment Key G)	ES_SUB_PAYMENT_KEY_G	Spain
Sub Payment Key (for Payment Key H)	ES_SUB_PAYMENT_KEY_H	Spain
Sub Payment Key (for Payment Key L)	ES_SUB_PAYMENT_KEY_L	Spain
Contract Subtype	ES_CONTRACT_SUB_TYPE_UDT	Spain
State/UT	IN_STATES	India
Pin Code	IN_PIN_CODES	India
Bank Name	IN_BANK	India
Branch Name	IN_BANK_BRANCH	India
Account Type	IN_ACCOUNT_TYPE	India
Contribution Period	IN_ESI_CONTRIB_PERIOD	India
Currency Period	IN_FINANCIAL_YEAR	India
Remittance Month	IN_CALENDAR_MONTH	India
Nature of Injury	IN_INJURY	India
Disablement Level	IN_DISABLEMENT_LEVEL	India

Field	Lookup	Legislation
Type (Extra Contact Information)	IN_NOMINATION_TYPES	India
Residential Status	IN_RESIDENTIAL_STATUS	India
Religion	IN_RELIGION	India
Community	IN_COMMUNITY	India
Employer Classification	IN_ER_CLASS	India
Trust Classification	IN_PF_CLASSIFICATION	India
Office Type	IN_OFFICE_TYPES	India
Industry Classification	IN_IND_CLASS	India
Joy Type	IN_JOB_TYPE	India
TDS Type on Bonus	IN_BONUS_TDS_TYPE	India
Reason for ESI Exemption	IN_ESI_EXEMPTION	India
Gratuity forfeiture reason	IN_GRATUITY_FORFEITURE_REASON	India
Leaving reason	LEAV_REAS	India
Allowance Categories for India	IN_ALLOWANCE_CATEGORY	India
Declaration Types	IN_TAX_DECLARATION_TYPES	India
City Types	IN_CITY_TYPE	India
Declaration Status	IN_DECLARATION_STATUS	India
Approval Status	IN_APPROVAL_STATUS	India
Declaration Types	IN_INPUT_NAMES	India

Field	Lookup	Legislation
Professional Tax Frequencies	IN_PT_FREQUENCIES	India
Employee Type	IN_EMPLOYEE_TYPE	India
Check Styles	IN_CHEQUE_REPORT	India
Other Termination Types	IN_OTHER_TERMINATIONS	India
Period	IN_PT_FORM3_QUARTERS	India
Frequency	IN_PT_FORM3_FREQUENCY	India
Year	IN_PT_FORM3_YEAR	India
Governorate	KW_GOVERNORATE	Kuwait
Employment Status	KW_EMPLOYMENT_STATUS	Kuwait
Banks	KW_BANKS	Kuwait
Company Types	KW_COMPANY_TYPE	Kuwait
Street Type	PL_STREET_TYPE	Poland
Province	PL_PROVINCE	Poland
District	PL_DISTRICT	Poland
Community	PL_COMMUNITY	Poland
Bank Branch	PL_BANK_BRANCH_NAME	Poland
Bank Name	PL_BANK_NAME	Poland
Period of Submission	PL_PLATNIK_TERM	Poland
Application to NIRDP	HR_PL_NIRDP_APPLICATION	Poland
Legal Base of Activity	PL_LEGAL_BASE_ACTIVITY	Poland

Field	Lookup	Legislation
Type of Property	PL_TYPE_OF_PROPERTY	Poland
Type of Service	PL_TYPE_OF_SERVICE	Poland
Employee Social Security Meaning	PL_EMP_SOCIAL_SECURITY_MEANING	Poland
Expense Type	PL_TYPE_OF_VEHICLE_EXPENSE	Poland
Paid By	PL_TYPE_OF_VEHICLE_PAYEE	Poland
Payment Mode	PL_TYPE_OF_VEHICLE_PAY_MODE	Poland
Bank Code	HR_KW_BANK_CODES	Kuwait
Loan Type	KW_LOAN_TYPE	Kuwait
Equipment Used	RU_EQUIPMENT	Russia
Alcoholic or Narcotic	RU_INTOXICATION	Russia
	RU_MARITAL_STATUS	Russia
Reserve Category	RU_RESERVE_CATEGORY	Russia
Rank	RU_MILITARY_RANK	Russia
Profile	RU_MILITARY_PROFILE	Russia
Service Readiness Category	RU_MILITARY_SERVICE_READINESS	Russia
Conscription Dismissal Mark	RU_QUITTING_MARK	Russia
No field name. Used internally to map codes in the PER_CATEGORIES lookup.	RU_EDUCATION_LEVELS	Russia

Field	Lookup	Legislation
No field name. Used internally to map codes in the PER_CATEGORIES lookup.	RU_ENTERPRISE_EDUCATION	Russia
Course Name	RU_COURSE_NAMES	Russia
Type of Qualification Improvement	RU_QUAL_IMPROVEMENT_TYPES	Russia
Document Name	RU_DOCUMENT_NAMES	Russia
	COMPETENCE_TYPE	Russia
Type of Activity	RU_ACTIVITY_TYPE	Russia
Calculated Record of Service Reason (CSR)	RU_CALC_RECORD_SERVICE	Russia
Insurance Type	RU_INSURANCE_TYPE	Russia
Limited Term Reason	RU_LIMITED_CONTRACT_REASON	Russia
Long Service Reason (LSR)	RU_LONG_SERVICE	Russia
Special Working Conditions	RU_SPECIAL_WORK_CONDITIONS	Russia
Territory Conditions	RU_TERRITORY_CONDITIONS	Russia
Usage Schedule	RU_USAGE_SCHEDULE	Russia
Vehicle Category	RU_VEHICLE_CATEGORY	Russia
Place of Birth/OKATO Code	RU_OKATO	Russia
SUN Code	SE_SKILLS_LEVEL_CODE	Sweden
County Code	SE_COUNTY_CODES	Sweden

Field	Lookup	Legislation
Municipality	SE_TAX_MUNICIPALITY	Sweden
Industry Code	SE_INDUSTRY_CODE	Sweden
Employment Category	SE_EMP_CATG	Sweden
Estimated Period of Absence	SE_EST_PER_ABS	Sweden
Central Reporting	SE_CENTRAL_REPORTING	Sweden
Religion	AE_RELIGION	UAE
City	AE_CITY_CODE	UAE
Emirate	AE_EMIRATE	UAE
Area	AE_AREA_CODE	UAE
Language	AE_LANGUAGES	UAE

Adding Lookup Types and Values

Lookups supply many of the list of values in Oracle HRMS and lookup values are the valid entries that appear in the list of values. They make choosing information quick and easy, and they ensure that users enter only valid data into Oracle HRMS.

Some Lookup Types have been predefined. You only need to define values for these types.

To create a new lookup type, add values to an existing lookup type, or prevent existing values from appearing in a lookup type, use the Application Utilities Lookups window.

> **Note:** You must log out and log in again to see the effect of your changes.

Defining Lookup Types

You can create your own lookup types to provide lists of values, for example to validate element entries.

To define a new lookup type and lookup values:

1. Choose the access level for the lookup type.
2. Enter the lookup type.
3. Enter the user name of the lookup. This is the name that users will see from within the application.

   Note: For US Federal users: Do not prefix EIT definitions with GHR_US. This prefix is reserved for the predelivered US Federal definitions.

4. Select the application in which the lookup will be used.
5. Optionally, add a description of the lookup type.
6. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check box. Existing lookup values are available to all business groups.

   Important: The Global Security Group check box only displays if you are using Security Group Enabled Security with a non-default security group. If you use Standard HRMS security, or the default (Standard) security group in Security Group Enabled Security, all lookup types are global.

   See: Categorizing Information By Security Groups, page 1-16

7. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.

   If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.

8. Save your work.

Defining Lookup Values

To add lookup values to an existing lookup type:

1. Query the lookup type to which you want to add a value.

   You cannot add values if the access level is System.

2. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check

box. Existing lookup values are available to all business groups.

> **Important:** The Global Security Group check box only displays if you are using Security Group Enabled Security with a non-default security group. If you use Standard HRMS security, or the default (Standard) security group in Security Group Enabled Security, all lookup types are global.

3. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.

> **Caution:** Do not change or remove any legislation codes that are shown in the Tag column for existing lookup values. This may have implications elsewhere in your HRMS system.

If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.

4. Save your work.

Removing Lookup Values

You can only remove lookup values if they are set up for a specific security group. However, you can stop all lookups appearing in lists of values.

> **Note:** You must be using Security Group Enabled security to categorize lookups by security groups. See: Categorizing Information By Security Groups, page 1-16

To remove a user defined lookup:

In the Application Utilities Lookups window, do one of the following:

- Enter an end date if you want to prevent users selecting this value after a certain date.
- Disable the code by un-checking the Enabled check box if you want to prevent users selecting this value with immediate effect from the current date.
- Change the meaning and description to create a replacement lookup.

If you add, disable, or change the meaning of a lookup, users must log out and log back in again for your changes to take effect.

To remove a lookup set up for a security group:

1. In the Application Utilities Lookups window, select the lookup type which has lookups for a specific security group.

2. Check the Global Security Group check box.

   This removes all lookups which have been set up for the security group linked to your current responsibility. Predefined lookups are not removed.

   If you add, disable, or change the meaning of a lookup, users must log out and log back in again for your changes to take effect.

Document Categories and Types

Overview of Document Categories and Types

The Documents of Record functionality enables you to create and maintain documents, such as medical certificates, visas, and licenses, in Oracle HRMS. These documents belong to document categories (for example, visa information), subcategories (for example, work visa or business visa), and types (for example, US H1, US H2). The following table provides additional examples:

Examples of Document Categories, Subcategories, and Types

Document Category	Document Subcategory	Document Type
Absence Information	Sickness	Doctor Certificate
	Maternity	Hospital Certificate
Personal Information	General	Birth Certificate
	General	Driver's License
Educational Information	Degree Certificate	Bachelor of Science
	Degree Certificate	Master of Science

Oracle provides some standard document types. However you can also create your own document categories, subcategories, and types to suit the particular requirements of your enterprise.

See: Creating Document Categories, Subcategories, and Types, page 3-103

See also: Documents of Record, *Oracle SSHR Deploy Self-Service Capability Guide* for information on using the Documents of Record function in SSHR.

Creating Document Categories, Subcategories, and Types

Although Oracle provides several document categories, subcategories, and types for use with the Documents of Record functionality, you may need to create new objects to match your specific business requirements. Use the following process to create these objects.

1. To create a new document category, use the Application Utilities Lookups window and the DOCUMENT_CATEGORY lookup type. Enter the name of the new document category in the lookup code region, for example, Professional Information.

   See: Adding Lookup Types and Values, page 3-99

2. To create a new document subcategory, use the User Types and Statuses window:

   1. Query the DOCUMENT_CATEGORY lookup in the Name field.

   2. Enter the document category, for example, Professional Information, in the System Type column.

   3. Enter the required subcategories in the Code column, for example, Diploma, Certificate, Award.

   See: Creating User Types and Statuses, page 3-107

3. To create new document types, run the Register Document Types (EITs) process.

   See: Running the Register Document Types Process, page 3-104

4. When you have created your document types, you must associate them with a responsibility in the Information Types Security window (in the same way as you associate Extra Information Types with a responsibility).

   See: Setting Up Extra Information Types for a Responsibility, page 3-38

   For more information on document categories and types, see: Overview of Document Categories and Types, page 3-103

Running the Register Document Types (EITs) Process

Use this process to create new document types for the Documents of Record functionality.

See: Overview of Document Categories and Types, page 3-103

Run this process from the Submit Requests window.

To run the Register Document Types (EITs) process:

1. In the Name field, select Register Document Types (EITs).

   The Parameters window appears.

2. In the Document Type field, enter a unique name for the new document type.

   Note: It is useful to prefix your document type with the legislation

code, for example, US, GLB, or FR.

Note: When the process runs, the application creates an internal name for the document type. The internal name is the same as the document type name and does not change, even if you subsequently change the document type name, for example, for translation. The internal name is used as the flexfield context.

3. In the Multiple Rows field, specify whether multiple occurrences of the same document type can exist. For example, for a birth certificate, the value would be No.
4. Enter the Category Code (mandatory) and Sub Category Code (optional).

   See: Overview of Document Categories and Types, page 3-103
5. Specify whether authorization is required for the new document type.
6. Click Submit.

User Types and Statuses

User Types and Statuses Window

The User Types and Statuses window enables you to extend certain delivered Oracle lookups to meet additional system requirements by creating user types and statuses for these lookups.

> **Note:** If you wish to use user types or statuses, you must modify your program code to point to enable user types or statuses for the relevant fields. However, Oracle recommends that you only use the User Types and Statuses form as described in the examples below.

You can define user types for specific business groups if required. If you do not define specify a business group, your user types and statuses will be available in all business groups.

Using the User Types and Statuses Window

You would like to categorize the white collar workers in the organization according to their function. However, the delivered Employee Category lookup type contains only one value for white-collar worker. To further extend the possible values of this lookup, you can create the following additional user values for the WHITE_COLLAR lookup of the EMPLOYEE_CATG lookup type:

- Office Clerk
- Office Manager
- Administration Staff

For more information on lookups in general, see: Lookups, page 3-59

Specific Applications of the User Types and Statuses Window

There are additional help topics available which illustrate specific uses of the User Types and Statuses window:

- To create position hiring statuses. Although several hiring statuses are delivered with Oracle HRMS, you can create multiple values for each system status if required.

  For more information, see: Position Hiring Statuses, *Oracle HRMS Enterprise and Workforce Management Guide*

- To create budget measurement types.

  For more information, see: People Budgets and Costing Overview, *Oracle HRMS*

Enterprise and Workforce Management Guide

- To create new document subcategories.

  For more information, see: Creating Document Categories, Subcategories, and Types, page 3-103

Some Oracle localizations also use the User Types and Statuses window. For example, Oracle HRMS for France uses the User Types and Statuses window to create additional information for contacts and collective agreements.

For more information on these applications, please see the following documentation:

- Setting Up Dependent Child Contact Relationships, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

- Setting Up Collective Agreement Entitlement Items, *Oracle HRMS Enterprise and Workforce Management Guide*

> **Note:** Please note that the above examples are specific to the French localization of Oracle HRMS and you should only use the User Types and Statuses window as described in the examples above.

Creating User Types and Statuses

You use the User Types and Statuses window to create user types and statuses for delivered standard lookups.

1. In the Name field, select the lookup type. For example, select the EMPLOYEE_CATG lookup.

2. If applicable, select a business group. If you do not specify a business group, the user type or status will be available globally.

3. In the System Type field, select the lookup value that you wish to extend. For example, select the White Collar system type.

4. Enter a description of the new user type or status. For example, enter Office Clerk as a description.

5. Enter a code for the new user type or status.

6. Enter Further Information as required. Depending on the lookup type or localization, you may have the option of entering additional data, such as marking a contract status for inclusion in reports, working hours, or hierarchy type.

7. Save your work.

You can enter additional values for each user type or status if required. For example, you may choose to create a further type or status for the White Collar lookup value such as Office Manager.

Alerts

Oracle HRMS Predefined Alerts

Use the Oracle HRMS Alerts to help you manage your enterprise and workforce more efficiently. Use the predefined alerts to inform, remind and confirm to you information on your personal details, your subordinate workforce and your organizations. For example, you could run HRMS Alert - New Hire Details Missing to ensure that you have all of the correct information for any newly hired employees.

See the *Oracle Alert's User Guide* for information on using and setting up the alerts.

The recipient of the alert is the person who meets the alert's requirements, usually a supervisor with a subordinate workforce. The recipient is sometimes required to perform an action based on the alert's email message, for example, if a piece of information is incorrect or missing and needs updating.

Configurable Options

Each of the HRMS alerts has been designed as a periodic alert with a set of predefined and configurable conditions. To view the configurable conditions and their descriptions, query the desired alert in the Alerts window. You can configure the conditions and determine how often you need the alerts run to suit your organizational needs. The alerts will check your database for these conditions according to the frequency you define.

See: Conditions of the HRMS Alerts, page 3-119

The table below describes each predefined alert with its specific business benefit, recommended frequency and any further information of when the alert sends an email notification to the recipient. An email will only be sent if the recipient meets the alert's requirements, the fixed and configurable conditions, and has a correctly formatted email address.

> **Warning:** Oracle HRMS only supports the default select statement in the Alerts window if it is unchanged.

Period Conditions

For alerts that are based on events, for example a new hire or a termination, you can use the following configurable conditions to control whether your alerts report on a specific day or over a range of days:

- **PERIOD_EVT_IN_X_DAYS** - setting this value configures alerts to detect events that occurred X days ago or will occur in X days time. For example, if you set this to

7 for an alert that detects events in the future, when the alert is run, it will look for events that will occur in 7 days time.

- **PERIOD_RERUN_EVENT_DAYS** - setting this value configures alerts to detect events that occurred or will occur during a number of days before the value set in the PERIOD_EVT_IN_X_DAYS condition. For example, if PERIOD_EVT_IN_X_DAYS is set to 7, and PERIOD_RERUN_EVENT_DAYS is set to 3, then for an alert that detects events in the future, it will look for events that will occur between 4 and 7 days from the current date. For alerts that detect events that have already happened, the above settings would mean an alert looks for events that occurred between 7 and 10 days before the current date.

For a future event, a new hire that is due to start work, you can use the HRMS Alert - New Hires (not yet started) to find out how many new hires are about to start work and when. For example, if the current date is 01-AUG-2003, and you set the value in the PERIOD_EVT_IN_X_DAYS condition to 14, the alert will return a list of new hires that are due to start on the 15-AUG-2003. If you set the frequency of this alert to run daily, it will run everyday from the 15-AUG-2003 and will send an email notification if it finds any new hires.

If you want the alert to return a list of new hires before the 15-AUG-2003, for example you have set the alert to run as above and you need to find out if any new hires are due to start between the 07-AUG-2003 and the 15-AUG-2003, you can set the value in the PERIOD_RERUN_EVENT_DAYS condition to 8. The alert will run in the period between the value set in the PERIOD_EVT_IN_X_DAYS condition and the value set in the PERIOD_RERUN_EVENT_DAYS condition, therefore an email notification will be sent if the alert finds any new hires that are due to start between the 07-AUG-2003 and 15-AUG-2003.

For a past event, an employee who has recently started employment, you can use the HRMS Alert - New Hire Details Missing to find out if they have any important information missing from their records. For example, if the current date is 28-DEC-2002, and you set the value in the PERIOD_EVT_IN_X_DAYS condition to 10, the alert will return a list of newly hired employees with missing information that started work on the 18-DEC-2002. If you set the frequency of this alert to run daily, it will run everyday from the 18-DEC-2002 and will send an email notification if it finds any newly hired employees with missing details.

If you also want the alert to return a list of newly hired employees that started before the 18-DEC-2002, for example you need to find out if any new employees started between the 14-DEC-2002 and the 18-DEC-2002, you can set the value in the PERIOD_RERUN_EVENT_DAYS condition to 4. The alert will run in the period between the value set in the PERIOD_EVT_IN_X_DAYS condition and the value set in the PERIOD_RERUN_EVENT_DAYS condition, therefore an email notification will be sent if the alert finds any newly hired employees with information missing from their records between the 14-DEC-2002 and the 18-DEC-2002.

Predefined Alerts Table

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Active Direct Reports - this alert returns a list of subordinates and their assignment details.	Monthly	Use this alert to ensure that the information on your workforce is correct.	This alert sends an email only if it identifies active employees and contingent workers with current assignments.
HRMS Alert - Cost Center Listing by Manager - this alert returns a list of cost centers managed by the recipient and the recipient's subordinates.	Monthly	Use this alert to ensure that the list of cost centers that you and your subordinates manage is accurate.	This alert sends an email only if it identifies organizations that are currently classified as company cost centers to a current cost center manager, who is either an employee or contingent worker.
HRMS Alert - Ended Cost Center Listing by Manager - this alert returns a list of end-dated cost centers managed by the recipient and the recipient's subordinates.	Monthly	Use this alert to inform you of any cost centers that have been end-dated that you or your subordinates manage. You can then use this information to update your records.	This alert sends an email only if it identifies organizations that are classified as company cost centers, and that have been end-dated before the current date to a current cost center manager, who is either an employee or contingent worker.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - New Hires (not yet started) - this alert returns a list of new members of the workforce that are due to start work.	Daily	Use this alert as a confirmation that new members of your workforce have been entered into the Oracle HRMS application, and as a reminder of their start date.	This alert sends an email only if it identifies employees or contingent workers who are due to start between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.
HRMS Alert - New Hire Details Missing - this alert returns a list of missing information for newly hired employees, such as salary basis and bank details.	Daily	Use this alert to inform you of any important information that is missing from a newly hired employee's record, and to ensure that the information is updated.	This alert sends an email only if it identifies current employee or contingent worker assignments that started between the current date, and the number of days previous, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Ending Probationary Period - this alert returns a list of the recipient's subordinates that are near the end of a review or probation period.	Daily	Use this alert to remind you when a member of your workforce is nearing the end of an employment review or probation period.	This alert sends an email only if it identifies current employee assignments that have probation periods that are due to end between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.
HRMS Alert - Performance Appraisal Due - this alert returns a list of the recipient's subordinates that require appraisals.	Daily	Use this alert to remind you when a member of your workforce is due an appraisal.	This alert sends an email only if it identifies active employees that have an appraisal due between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. The alert will not be sent if an appraisal of the same appraisal type has already occurred.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Performance Appraisal Passed Due - this alert returns a list of the recipient's subordinates that have appraisals outstanding.	Daily	Use this alert to remind you when a member of your workforce is overdue an appraisal.	This alert sends an email only if it identifies active employees that were due an appraisal from the current date, and the number of days previous, which you indicate in the PERIOD_EVT_IN_X_DAYS condition and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. The alert will not be sent if an appraisal of the same appraisal type has already occurred.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Overlapping Position Incumbency - this alert returns a list of the recipient's subordinates that are in positions where there is an unacceptable position incumbency overlap due to occur.	Daily	Use this alert to warn you when members of your workforce are in positions where there is an unacceptable position incumbency due to occur. You can then use this information to correct or update your records.	This alert sends an email only if it identifies employee assignments that occupy the same position, that has a maximum headcount of one and the maximum overlap duration (for that position) is due to end between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. The alert will not include a position if it has two or more assignments assigned to it.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - People Terminating in the Next Week - this alert returns a list of the recipient's terminating workforce one week before they leave.	Daily	Use this alert to remind you to perform any termination procedures and collect any company assets.	This alert sends an email only if it identifies an employee's or contingent worker's period of service or placement is due to end between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.
HRMS Alert - People Returning from Leave of Absence - this alert returns a list of subordinates to the supervisor who are due to return from a suspended assignment.	Daily	Use this alert to inform you of your subordinate's return date.	This alert sends an email if it identifies active employee assignments that have a current status of Suspended and a future dated assignment change between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition with an assignment status of active.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Open Vacancies Listing - this alert returns a list of outstanding vacancies that are assigned to the recipient.	None	Use this alert to provide you with a list of outstanding vacancies that are assigned to you and require an action.	This alert sends an email only if it identifies active vacancies.
HRMS Alert - Personal Details Review - this alert returns details of the recipient's important personal information.	Bi-annually	Use this alert to review your important personal information to ensure it is correct.	This alert sends an email if it identifies active employee and contingent worker primary assignments.
HRMS Alert - People Without a Supervisor - this alert returns a list (to a nominated user) of all current employees and contingent workers that do not have a supervisor.	Monthly	Use this alert to ensure that all workers are assigned to a supervisor.	This alert sends an email only if it identifies active assignments without a direct or valid supervisor.
HRMS Alert - Payroll Run Completed - this alert returns a confirmation (to a nominated user) of the latest successful payroll run	Daily	Use this alert to confirm a successful payroll run.	This alert sends an email only if it identifies payroll actions that have a status of complete between the current date, and the number of days previous, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - People Without Email Addresses - this alert returns a list of the recipient's subordinates that do not have an email address.	Monthly	Use this alert to inform you of any subordinates that do not have a valid email address. Use this information to update your records.	This alert sends an email only if it identifies active employee and contingent worker primary assignments that do not have an email address or have an incorrectly formatted email address.
HRMS Alert - Training Attendance Reminder - this alert returns a list of training events that the recipient or their subordinates are due to attend or have attended.	Daily	Use this alert to remind you of any training events that you or your subordinates are due to attend or to inform you of any training events that you or your subordinates have attended.	This alert sends an email only if it identifies active employee or contingent worker delegate assignments that are due to attend a training event or have previously attended a training event between the days you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. A training event will only be included if it is not a development event and if it has not been cancelled.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Workers Competencies Expiring - this alert returns a list of competencies that the recipient and their subordinates have that are due to expire.	Daily	Use this alert to remind you of any competencies that you or your subordinates have that are due to expire.	This alert sends an email only if it identifies active employees or contingent workers that have competencies that are due to expire between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. An email will not be sent if the competence is due to restart the day after it expires.

Using the Alerts

For information on using the alerts see the *Oracle Alert's User Guide*.

For an example of how to use a HRMS alert, see: Example of Setting up a HRMS Alert, page 3-122.

For information on the configurable conditions for the alerts, see: Conditions of the HRMS Alerts, page 3-119.

Conditions of the HRMS Alerts

The conditions of the alerts enable you to control the content of the alert and who receives them. Each alert provides you with a number of configurable options that you can configure to provide email notifications to best suit your organizational needs. For example, if you want to send the HRMS Alert - Training Attendance Reminder to the supervisor of an employee that is due to attend a training course, you can set the value of the SEND_TO_ASG_SPVSR condition to Y. When the alert is run, an email notification is sent to the supervisor regarding the training event.

The table below describes each condition and its default value.

The HRMS Alerts Conditions Table

Condition	Default Values	Description
ALERT_BANK_DETAILS	Y	If set to Y an alert will be raised when bank details have not been set for a new hire.
ALERT_GRADE_PLACEMENT_MISSING	N	If set to Y an alert will be raised when grade placements have not been set for a new hire.
ALERT_PAY_METHOD_MISSING	Y	If set to Y an alert will be raised when the pay method has not been set for a new hire.
ALERT_PAYROLL_MISSING	Y	If set to Y an alert will be raised when the payroll has not been set for a new hire.
ALERT_SALARY_BASIS_MISSING	Y	If set to Y an alert will be raised when the salary basis has not been set for a new hire.
ALERT_SALARY_MISSING	Y	If set to Y an alert will be raised when the bank details have not been set for a new hire.
ALERT_SUPERVISOR_MISSING	N	If set to Y an alert will be raised when a new hire does not have a supervisor.
DISPLAY_SALARY_AMOUNT	N	If set to Y the actual salary amount displays on the alert.

Condition	Default Values	Description
EXCLUDE_CEO	Blank	If set to an employee number, that employee will be excluded from the alert, if blank then all employees will be considered within the scope of the alert.
INCLUDE_ALL_NEW_STARTS	N	If set to Y an alert will be raised for all new hires regardless of whether they have missing details or not.
INCLUDE_BUSINESS_GROUP	Blank	Restricts the alert to a named business group. If not set, all business groups will display.
INCLUDE_CONT_FLAG	N	Includes contingent workers within the scope of the alert.
INCLUDE_EMP_FLAG	Y	Includes employees in the scope of the alert.
INCLUDE_ORGANIZATION	Blank	Restricts the alert to a named organization. If not set, all organizations will display.
INCLUDE_SECONDARY_ASG	N	If set to Y an alert will include information for a secondary assignment.
PERIOD_EVT_IN_X_DAYS	7	Set the alert to X number of days before or after an event.
PERIOD_RERUN_EVENT_DAYS	0	Allows a rerun of the alert and provides an additional configuration option to run the alert for a period of time rather than a single day.
*SEND_TO_ASG_PSN	Y	Send alert to the person (with an assignment) who is the subject of the alert.

Condition	Default Values	Description
*SEND_TO_ASG_SPVSR	Y	Send alert to the supervisor of the person (with an assignment) who is the subject of the alert.
*SEND_TO_NAMED_USER	N	Send a copy of the alert to the specified email address.
*SEND_TO_PASG_SPVSR	N	Send alert to the primary assignment supervisor of the person who is the subject of the alert.
*SEND_TO_PSN	Y	Send alert to the person who is the subject of the alert.
*SEND_TO_SUP_PSN	N	Send alert to the supervisor of the person who is the subject of the alert.

Warning: If you set more than one of the *Send_To condition values to Y, the recipient of the alert may receive duplicate information in the alert notification.

Example of Setting up a HRMS Alert

This topic is an example of the steps you perform to set up the HRMS Alert - Cost Center Listing by Manager.

To set up the HRMS Alert - Cost Center Listing by Manager:

1. Query the HRMS Alert - Cost Center Listing by Manager in the Alerts window.
2. Choose Tools in the menu, and select the Transfer Alert option to copy the alert.

   See: Transferring Alert Definitions in the *Oracle Alert's User Guide* for more information on copying an alert.
3. Ensure you rename the alert and choose the same database in the Destination Alert region of the Transfer Alert Definition window.

Note: It is important to rename your alerts and to save them to the same database. This ensures that any changes you make to the alert are specific to your alert and not the predefined alert.

4. Choose the Transfer button, close the Transfer Alert Definitions window and query your copied alert.

5. Check the Enabled button to enable your alert.

   You can check your periodic alerts regardless of the frequency you define. See: Checking a Periodic Alert in the *Oracle Alert's User Guide* for information on checking your periodic alerts and their enabled action sets.

6. Set the frequency to On Day of the Month and enter 1 as the day number for the alert to run on the first day of every month.

   See: Creating a Periodic Alert in the *Oracle Alert's User Guide* for more information on setting up the frequency.

7. Choose the Action Details button to set up the conditions of the alert. The conditions you set up here specify the scope of the alert.

   See: Specifying the Alert Details in the *Oracle Alert's User Guide* for more information.

8. Enter the business group name in the Value field for the INCLUDE_BUSINESS_GROUP optional condition for which you want the alert to run.

   Warning: You must enter a valid value for the alert to run successfully. For example, if you enter an invalid business group name, the alert will not find any information and an email notification will not be sent.

9. Change the INCLUDE_CONT_FLAG condition to Y in the Value field to include contingent workers in the scope of the alert.

   Warning: The Value field is case sensitive, you must ensure that you enter the value as uppercase.

10. Leave the INCLUDE_ORGANIZATION condition blank in the Value field, as this example wants the alert to include all organizations within the business group in the scope of the alert.

Note: You can restrict this condition to a specific organization if you enter an organization name.

11. Leave all other conditions with their default values.

    As an additional verification step, you can set the conditions up in the Alert Details window with the same values as in the Action Details window, to test your alert to find out if it returns the number of rows you expect. You use the Run button to test and verify your alert.

    See: Creating a Periodic Alert in the *Oracle Alert's User Guide* for more information on verifying your alerts.

    This alert now runs on the first day of every month, and sends an email notification to employees and contingent workers if it identifies them as current company cost center managers within the specified business group.

Custom Library Events and APIs

CUSTOM Library Events

Generic Events

An event is a point within the processing of a form at which you can call custom code from the CUSTOM library. For example, you can use the event WHEN-FORM-NAVIGATE to code a sequence of logic that occurs after any existing logic for the form, block or item. WHEN-FORM-NAVIGATE is an example of a generic event available to all the windows in Oracle Applications. For a complete list of generic events see: Events Passed to the CUSTOM Library, *Oracle Applications Developer's Guide.*

Product-Specific Events

In addition to generic events, Oracle HRMS provides a range of product-specific events that you can use to make CUSTOM library calls to support your business rules. The product-specific events for HRMS are available for most HRMS windows. The following table details the purpose of each event and shows when the events occur.

Event Name	Purpose	When Occurs
WHEN-CREATE-RECORD	Enables you to specify values that will appear by default when you create a new record.	After the form has processed.
POST-QUERY	Enables you to add additional derivation or validation on completion of a query.	After the form has processed.
KEY-DELREC	Enables you to add an extra level of validation before users are allowed to delete a record from the database.	Immediately before the user is asked to confirm the deletion of the record.

Event Name	Purpose	When Occurs
PRE-UPDATE, PRE-INSERT and PRE-DELETE	Enables you to add additional validation before the update, insert or delete action is performed.	After any data validation. Before DateTrack manupulation if the block contains DateTrack features.
POST-INSERT, POST-UPDATE and POST-DELETE	Enables you to add additional insert, update, or delete actions to user tables. We do not recommend using these events for validation.	After the form has processed.
POST-FORMS-COMMIT	Enables you to specify an action to occur as the last action in a sequence of commit actions.	After the form has processed.
WHEN-BUTTON-PRESSED	Enables you to perform custom validation before a button action is performed.	After any data validation. Before any action (for example, display new window) has been performed.
DT_CALL_HISTORY	Enables you to change which database view is used by DateTrack History.	After the user has requested to use DateTrack History and the form has derived the standard details. Before the DateTrack History window is visible.
DT_SELECT_MODE	Enables you to restrict the DateTrack modes that a user can select.	After the form has derived which DateTrack modes are available but before the mode selection window is visible.

Event Name	Purpose	When Occurs
NAVIGATE	Enables you to supplement the validation that takes place when the user selects a task flow navigation option. The following field values are set for the duration of this event: CTL_GLOBALS.DESTINATION_FORM CTL_GLOBALS.DESTINATION_BLOCK	After the user selects a task flow navigation option but before the new window opens.

Publicly Callable Business Process APIs in Oracle HRMS

Application Programmatic Interfaces (APIs) are a logical grouping of all external process routines. The Oracle HRMS API strategy delivers a set of PL/SQL packages procedures and functions that provide an open interface to the database.

Oracle® Integration Repository, an integral part of Oracle E-Business Suite, is a compilation of information about the numerous interface endpoints exposed by Oracle applications. The full list of public APIs and the purpose of each API is available in the integration repository. See: Oracle Integration Repository Overview, *Oracle Integration Repository User Guide*

For information on how to access and use Oracle Integration Repository, see: Accessing Oracle Integration Repository, *Oracle Integration Repository User Guide*

For information on how to call APIs, see the technical essay APIs in Oracle HRMS, *Oracle HRMS Implementation Guide*

APIs Available for HR Foundation Users

Application Programmatic Interfaces (APIs) are a logical grouping of all external process routines. The Oracle HRMS API strategy delivers a set of PL/SQL packages procedures and functions that provide an open interface to the database.

Oracle® Integration Repository, an integral part of Oracle E-Business Suite, is a compilation of information about the numerous interface endpoints exposed by Oracle applications. The full list of public APIs and the purpose of each API is available in the integration repository. See: Oracle Integration Repository Overview, *Oracle Integration Repository User Guide*

HR Foundation users can only use restricted parameters in some APIs. The integration repository provides information on the restricted parameters. For information on how to access and use Oracle Integration Repository, see: Accessing Oracle Integration Repository, *Oracle Integration Repository User Guide*

For information on how to call APIs, see the technical essay APIs in Oracle HRMS, *Oracle HRMS Implementation Guide*

Info Online Links to Information Provider Websites

Info Online Links to Information Provider Websites

Oracle HRMS provides the capability to enable context-sensitive links between Oracle HRMS windows and web pages, and information provider websites. Once the links have been enabled, users can access an information provider website directly from a button or link on an Oracle HRMS window or self-service web page. Depending on the level of configuration available, the link can lead directly to a page relevant to the window or even the record on which the user is working.

For example, someone entering tax information might access a website providing up-to-date information on tax regulations, or an administrator looking at benefit details for an employee could open a web page providing documentation for that employee's benefit plan.

Note: Info Online was previously known as the Knowledge Integrator.

Accessing Information Provider Websites

There are two supported versions of Info Online. The system administrator sets the version to use in the HR: KI Framework Version profile. The default value for this profile is Version 1.

If the system administrator sets the profile to Version 1, users can access:

- RIA (Research Institute of America) through the user interface for some payroll forms
- Authoria, a provider of health insurance and compensation information, through links on some Benefits self-service web pages
- Metalink, Oracle's support website, though the Info Online button from the user interface

If the system administrator sets the profile to Version 2, users can access:

- Metalink and iLearning on self-service web pages in which the content container has been included
- Transcentive through the menu link from the professional user interface and self-services pages, after completing the setup steps.

In both versions, login to the information provider website is usually handled automatically when the user logs into Oracle HRMS.

Once the system administrator has enabled the links between Oracle HRMS and the information provider pages, users access information provider websites from the user interface by clicking the Info Online button on the Oracle HRMS toolbar, or by selecting Tools > Info Online from the menu (Shift+Control+F7). This button is enabled in windows for which information provider links have been configured and enabled.

> **Note:** Shift+Control+F7 is the key sequence currently mapped to Function 7. Choose Help -> Keyboard on the menu to determine the actual key combination. The *Oracle Forms Deployment Guide* explains how to change this key assignment in the Oracle Terminal resource file fmrweb.res.

Choosing the Info Online button first opens a list of values, displaying a list of links to any information provider websites that are enabled for the current window. When the user selects a value from the list, a browser window opens at the appropriate page.

If the user chooses the Info Online button from a window for which no links to information provider websites are enabled, no list of values appears.

Users can control the behavior of the Info Online button using the Open in New Window option on the Tools menu. When this option is checked, each new search opens in a new browser window. This option allows users to compare results from different queries side by side, but the windows remain open until the user specifically closes them. When this option is unchecked, the page appears in the last browser window opened.

Users access information provider websites from the self-service web pages either through links on Benefits pages or through the content container. The list of applicable topics and providers appear alphabetically in the content container. See: Info Online Content Container, page 3-132

Profile Options

You must set the following profile options to set up links between Oracle HRMS and any information provider websites:

- HR: KI Framework Version
- HR: Extension Agent Enabled
- HR: Extension Agent Client Timeout

Setting the following additional profile options is optional if you are setting up links between Oracle HRMS and any information provider websites:

- HR: Extension Agent
- HR: Info Online: Open in New Window

- HR: Info Online: Toolbar Icon
- HR: KI Maximum Topics and Integrations
- HR: Servlet Timeout

Additional required and optional profile options exist for individual information providers. See: User Profiles, page 1-59

Information Providers

Integration is available between Oracle HRMS and the following information providers:

Oracle MetaLink

Oracle's MetaLink website provides access to the latest product information, discussion forums, bug fixes, and patch information for Oracle HRMS, as well as enabling users to contact Oracle Support. Integration is available for all Oracle HRMS windows in the user interface in KI Framework Version 1 and for self-service web pages which include the content container in KI Framework Version 2. This integration is available for all legislations.

See MetaLink Note 229585.1 for details of how to set up links from Oracle HRMS to MetaLink pages.

Authoria HR

Integration is available between a number of Oracle Advanced Benefits windows and self-service pages and the third-party product Authoria HR in KI Framework Version 1. This integration is available for UK and US legislations. See: Links to Authoria HR, page 3-132

Also see MetaLink Note 215637.1 for details of how to set up links from Oracle HRMS to Authoria HR pages.

RIA PCP on Checkpoint

Integration is available between Oracle HRMS US tax windows and third-party information provider RIA's Payroll Compliance Pro on Checkpoint in KI Framework Version 1. This integration is available for US legislations.

See MetaLink Note 148468.1 for further details of how to set up links from Oracle HRMS to RIA PCP on Checkpoint.

Transcentive

Integration is available between Oracle HRMS windows and Transcentive, a third-party compensation management solutions provider, in KI Framework Version 2. This integration is available for all legislations.

See MetaLink Note 294453.1 for further details of how to set up links from Oracle HRMS to Transcentive.

iLearning

Oracle iLearning is an enterprise learning management system that prescribes, delivers and tracks learning, and monitors and manages the learning process. Integration is available between the Rapid Implementation Workbench web pages and Oracle iLearning in KI Framework Version 2.

See MetaLink Note 294453.1 for further details of how to set up links from the Rapid Implementation Workbench web pages to Oracle iLearning.

Info Online Content Container

The Info Online content container is an ancillary region that appears on self-service web pages. Topics and providers appear as an alphabetical list of links in the content container.

On clicking a topic, the list of providers who provide content for the topic appears in a new window. If only one provider exists for the selected topic, the single provider's page opens immediately.

Users can also select a provider from the list in the content container, and view a list of topics offered by that provider.

The More link appears when the number of topics or providers exceeds a predefined limit. The limit of topics or providers is set in the HR: KI Maximum Topics and Integrations profile. If no limit is set, the More link appears when the number of topics or providers exceeds 3. On clicking the More link from the topics or providers region, the complete set of topics or providers appears in a new page.

Info Online Links to Authoria HR

Authoria HR uses a common knowledge repository to manage and communicate HR and benefits information. You can configure context-sensitive access between Oracle HRMS and Authoria HR. End users can follow links from the user interface windows and self-service pages to display Authoria HR documentation directly related to the record they are working with.

This feature is available for US and UK legislations.

Note: Info Online was previously known as the Knowledge Integrator.

Links from Oracle Windows and Self-Service Pages

Integration with Authoria HR is enabled for the following Oracle Standard and

Advanced Benefits windows:

- View Enrollment Results window (BENDSPER)
- View Participation Information window (BENDISPL)
- Flex Program window (BENEFXEB)
- Non-Flex Program window (BENENFEB)
- Savings Plan window (BENESPEB)
- Miscellaneous Plan window (BENEMSEB)
- Person Life Events window (BENDSPLE)

Integration is also enabled for the following self-service pages:

- Benefits Enrollment Overview page (BEN_ENRL_OVERVIEW_PAGE)
- Current Benefits page (BEN_CURR_OVW_PAGE)
- Confirmation page (BEN_ENRL_CONF_PAGE)
- Benefits Selection page (BEN_ENRT_SELECTION_PAGE)

Accessing Authoria HR

Access to Authoria HR is available in user interface windows from the Info Online button on the toolbar or the Info Online option on the Tools menu (Shift+Control+F7).

When a user chooses the Info Online button in one of the windows in which the feature is enabled, a list of values appears, listing the pages in the Authoria HR system applicable to the current context. If other Information Provider links have been enabled, these are also displayed. When the user selects an Authoria link from the list of values, a browser window opens at the appropriate Authoria HR page.

Users can control the behavior of the Info Online button using the Open in New Window option on the Tools menu. When this option is checked, each new search opens in a new browser window. This allows users to compare results from different queries side by side, but they must close each window when finished. When this option is unchecked, the the last browser window that was opened is used to display the Authoria HR page.

From the self-service interface, access to Authoria HR is via hypertext links in the Oracle Standard and Advanced Benefits pages. The links appear only when there is a mapping between the page and a page in the Authoria HR system. When a user clicks on a link, a new browser window opens and displays the page from the Authoria HR system applicable to the current context.

See: Configuring Links Between Oracle HRMS and Authoria HR, page 3-136

Example SQL Script to Populate Mapping Table

This example script configures links between Oracle benefit plans and programs and Authoria HR pages. See Configuring Mappings Between Oracle and Authoria HR, page 3-137 for information on how to configure this script for your own use.

The script assumes that there are no mappings stored in the table to begin with. The mappings are business group-specific. Each plan/program combination results in two mappings, one for open enrollment and the other for non-open enrollment. The open enrollment mapping is typically to a common open enrollment page.

The script shows the following four mappings:

- A plan named 'ACME Dental NonFlex' exists in the program 'ACME Program NonFlex'. This is mapped to the Authoria page 'AnnEnroll' during open enrollment, and at other times to the page 'Dental'. This results in the procedure call for non-open enrollment:

```
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
                'N','Dental',l_business_group_id);
```

- and for open enrollment:

```
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
               'Y','AnnEnroll',l_business_group_id);
```

- A plan 'Saving Plan', that is not in a program, is mapped to the Authoria page 'AnnEnroll' during open enrollment, and at other times to the page 'Sav'. This results in the procedure call for non-open enrollment:

```
create_page_map('Saving Plan',NULL,
                'N','Sav',l_business_group_id);
```

- and for open enrollment:

```
create_page_map('Saving Plan',NULL,
               'Y','AnnEnroll',l_business_group_id);
```

Example Script

```
REM +=============================================+
REM SQL Script File Name : create_page_map.sql
REM Description: Seed Authoria page mappings via APIs
REM +=============================================+
declare
l_business_group_id number;
procedure create_page_map
 (p_plan_name                      in     varchar2
 ,p_program_name                   in     varchar2
  ,p_open_enrollment_flag           in     varchar2
 ,p_target_page                    in     varchar2
  ,p_business_group_id              in     number
 ) is
--
l_authoria_mapping_id number;
l_object_version_number number;
l_plip_id number := null;
l_pl_id number;
l_pgm_id number := null;
-- value -924926578 represents a number unlikely to
-- exist in the database
cursor csr_exists is
  select authoria_mapping_id,
         object_version_number
  from  hr_authoria_mappings
  where pl_id            = l_pl_id
    and nvl(plip_id,-924926578) = nvl(l_plip_id,-924926578)
    and open_enrollment_flag = p_open_enrollment_flag;
begin
-- get pl_id
select pl_id
into l_pl_id
from ben_pl_f
where sysdate between effective_start_date
                and effective_end_date
and name = p_plan_name
and business_group_id = p_business_group_id;
if (p_program_name is not null) then
  -- get pgm_id
  select pgm_id
  into l_pgm_id
  from ben_pgm_f
 where sysdate between effective_start_date
                   and effective_end_date
    and name = p_program_name
    and business_group_id = p_business_group_id;
 select plip_id
  -- get plip_id
  into l_plip_id
 from ben_plip_f
 where sysdate between effective_start_date
                   and effective_end_date
    and pl_id = l_pl_id
    and pgm_id = l_pgm_id
   and business_group_id = p_business_group_id;
end if;
-- see if there is an existing record
open csr_exists;
fetch csr_exists into l_authoria_mapping_id
```

```
,l_object_version_number;
if csr_exists%found then
 -- do update
 HR_AUTHORIA_MAPPING_API.update_authoria_mapping
    (
    p_authoria_mapping_id           => l_authoria_mapping_id
    ,p_pl_id                         => l_pl_id
    ,p_plip_id                       => l_plip_id
   ,p_open_enrollment_flag          => p_open_enrollment_flag
    ,p_target_page                   => p_target_page
   ,p_object_version_number         => l_object_version_number
    );
else
 -- do insert
  HR_AUTHORIA_MAPPING_API.create_authoria_mapping
    (
    p_pl_id                          => l_pl_id
   ,p_plip_id                        => l_plip_id
   ,p_open_enrollment_flag           => p_open_enrollment_flag
   ,p_target_page                    => p_target_page
   ,p_authoria_mapping_id            => l_authoria_mapping_id
   ,p_object_version_number          => l_object_version_number
end if;
    );
close csr_exists;
end;
--
BEGIN
--
select business_group_id
into l_business_group_id
from per_business_groups
where name = 'SC Benefits';
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
               'N','Dental',l_business_group_id);
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
                'Y','AnnEnroll',l_business_group_id);
create_page_map('Saving Plan',NULL,
               'N','Sav',l_business_group_id);
create_page_map('Saving Plan',NULL,
               'Y','AnnEnroll',l_business_group_id);
--
END;
/
COMMIT;
EXIT;
```

Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR

You can configure links between Oracle Standard and Advanced Benefits windows and self-service pages and Authoria HR. See: Info Online Links to Authoria HR, page 3-132

To Configure Links Between Oracle Standard and Advanced Benefits and Authoria HR:

1. You must first install the required versions of Oracle HRMS and Authoria HR. For

further details on installation and implementation, see Metalink Note 215637.1.

2. Ensure that the following profile options are set:
   - HR: Extension Agent Enabled
   - HR: Authoria Integration Enabled
   - HR: Authoria US URL *and/or* HR: Authoria UK URL
3. Check the following optional profile options to see whether you should set them for your system:
   - HR: Extension Agent
   - HR: Info Online: Open in New Window
   - HR: Info Online: Toolbar Icon

   For further details of profile options, see: User Profiles, page 1-59
4. Set up your Oracle benefit plans and programs.
5. Set up your Authoria HR benefit plans. For further details, see your Authoria HR documentation.
6. Configure mappings between Oracle and Authoria HR, page 3-137

Configuring Mappings between Oracle and Authoria HR

Before users can access Authoria HR pages from Oracle HRMS windows or self-service web pages, you must configure the mappings between your Oracle HRMS benefits and the pages you have set up in Authoria HR.

To Configure Mappings:

1. Identify the pages in Authoria HR that you want to link to each of your Oracle benefit plans and programs.
2. Edit the following select statement in the example SQL script, page 3-134 to include the appropriate business group by replacing "SC Benefits" with the required business group name:

```
select business_group_id
into l_business_group_id
from per_business_groups
where name = 'SC Benefits';
```

3. For each mapping, add a create_page_map procedure, replacing the example

create_page_map procedure lines. Add a separate line for each mapping.

The create_page_map procedure takes the following arguments:

Mapping Arguments

Procedure	Description
p_plan_name	the name of the benefits plan
p_program_name	the name of the benefits program (null if the plan is not in a program)
p_open_enrollment_flag	indicates whether the page mapped to is for open enrollment. Allowed values are Y or N.
p_target_page	the name of the target page in the Authoria application
p_business_group_id	the business group id, as determined using the select statement

4. Run the SQL script.

   The script calls the HR_AUTHORIA_MAPPING API, which saves the mappings in the Oracle database table HR_AUTHORIA_MAPPINGS.

Link Windows (Task Flow)

Task Flow

You can link windows used to complete tasks in a *task flow.* Then, you can choose a button to bring up each window in turn without returning to the menu.

The first window in the task flow defines the *context* of the subsequent windows. For example, if the task flow begins with the People window, all subsequent information is entered for the person you enter or query in the People window.

You can include configured windows in task flows. For example, you might create a version of the People window that handles applicants only. You could then use this window in a recruitment task flow. Or you might configure a People Management template and add task flow buttons to provide access to other windows.

Using Forms or Workflow

There are two methods you can use to create and maintain your task flows:

- Using Forms, page 3-148
- Using Oracle Workflow, page 3-147

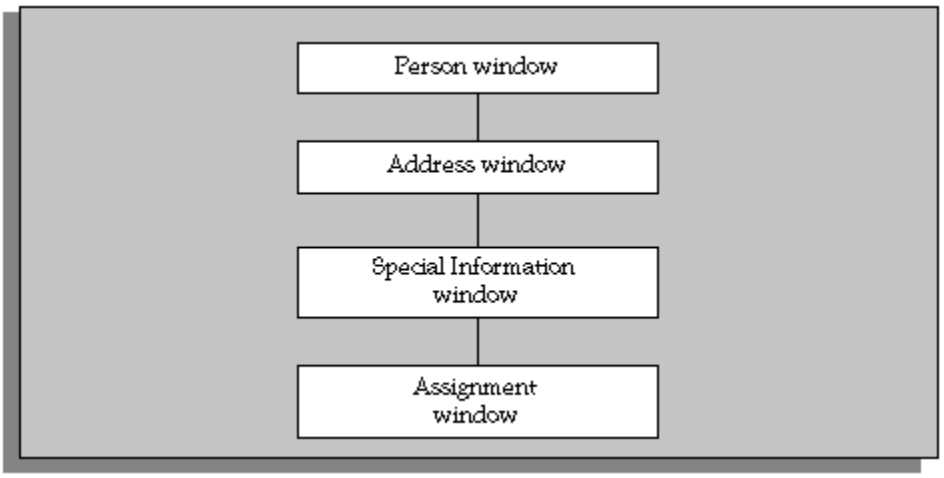
You can model your task flows using Oracle Workflow (version 2.0.3.8.1 or higher) then generate a task flow. This method of creating task flows has the advantage of using a diagrammer to help you design the sequence of windows.

> **Caution:** Do not use apostrophes or "%" symbols in task flow names or task flow node names.

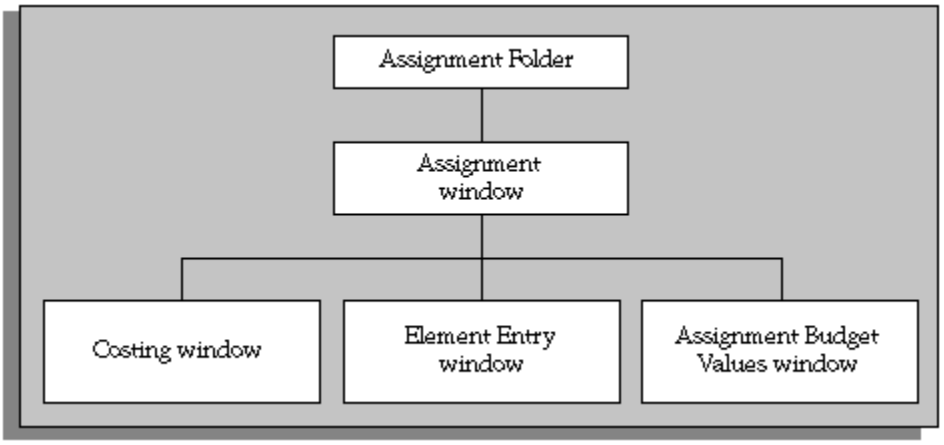
Sequential or Branched Structure

Task flows can follow a sequential or a branched structure, as shown in the following two figures. You can choose how many navigation options users have from each window in the task flow. You can also choose the labels that appear on the navigation buttons, and you can define access keys.

Sequential Task Flow



Branched Task Flow



Predefined Task Flows

Oracle HRMS supplies several predefined task flows that include all the windows that you can use in task flows. They are designed as a simple structure to use during implementation, not as a recommended structure for users.

Predefined task flows are translated into your base language when you install Oracle HRMS. However, if you install an additional language, you need to create new versions of your task flows in that language. You can then link these to the correct menu for the language.

When you install a new version of Oracle HRMS, any changes you have made to the standard task flows supplied by Oracle are removed.

Important: If you have made any changes to standard task flows, you will need to recreate them in each new version of the software. It is therefore recommended that if you wish to make changes to task flows, you do so by copying a standard task flow and making changes to the copy.

Transferring Task Flows Between Databases

You can transfer a task flow you have created using Forms or Workflow from one database to another; for example, to add new task flows you have created in a test database into your production database. You do this by saving the task flow from the first database to a file, then importing the file to the second database. See Transferring Task Flows, page 3-158.

Legislation-specific Task Flows

When installing Oracle HRMS, you can install only global task flows and task flows specific to the legislation you have installed.

Note: This does not include US- and UK-specific task flows, which are installed with all legislations.

When defining a new task flow, you must specify that the task flow is global or that it is specific to a legislation you have installed.

See Defining Task Flows, page 3-149

Note: Task flows created by converting from Oracle Workflow are always global.

When downloading task flows, you can download only global task flows and task flows specific to the legislation(s) you have installed.

See Transferring Task Flows Between Databases, page 3-158

Task Flow Windows

You can create your own task flows by referencing the windows listed in the table below, or configured versions of them. Some of these windows require the context of an assignment. This means that one of the following windows must appear above them in the task flow:

- Assignment window
- Assignments Folder window

- Application window (for applicant assignments)
- a People Management template window that identifies assignments

All task flows must begin with one of the following windows:

- A Maintenance window created from a People Management template
- People and Assignment (PERWSHRG)
- People (PERWSEPI)
- People Folder (PERWSFPE)
- Assignments Folder (PERWSFAS)
- Assignment (PERWSEMA)
- Job (PERWSDJT)
- Position (HRWSPSF)
- Position (non HRMS users) (PERWSDPO)
- Location (PERWSLOC)
- Collective Agreements (PERWSDCA)
- Tax Balance (PAYUSTBA)

> **Note:** If you are not using People Management templates, use the combined People and Assignment form (PERWSHRG), rather than the separate forms (PERWSEPI and PERWSEMA), to allow the Assignment window to open more quickly from the People window. We recommend that you use the combined form in any task flow that requires both windows. The predefined task flows use the combined form.

Windows You Can Use in Task Flows

Window	Context Required
Absence Detail	Person (employee)

Window	Context Required
Address	Person
Adjust Balances (Oracle Payroll)	Assignment (employee)
Agreement and Grade Results	Assignment (employee)
Allocated Checklists	Person (employee, applicant, or contingent worker) / Assignment
Applicant Interview	Assignment (applicant)
Application	Person (applicant)
Assignment	Person (employee)
Assignment Budget Values	Assignment
Assignments Folder	None
Assignment Rates	Assignment (contingent worker)
Belgian Tax Information (Belgian legislation only)	Assignment (employee)
Beneficiaries (US legislation only)	Element entry
Book Events	Person (employee or applicant)
COBRA (US legislation only)	Assignment (employee)
Communication Delivery Methods	Person
Competence Profile	Person
Contact	Person
Contract	Person
Costing	Assignment (employee)

Window	Context Required
Covered Dependents (US legislation only)	Element entry
Disability (global and selected legislations)	Person
Documents of Record	Person
Element Entries	Assignment (employee)
Employee Review	Assignment (employee)
Employee Tax Rules (US Oracle Payroll)	Assignment (employee)
Employment Declaration (Australian legislation only)	Assignment (employee)
End Placement	Person (contingent worker)
External/Manual Payments (Oracle Payroll)	Assignment (employee)
Extra Assignment Information	Assignment (employee or applicant)
Extra Job Information	Job
Extra Location Information	Location
Extra Person Information	Person (employee or applicant)
Extra Position Information	Position
Grade Step Placement	Assignment (employee)
Medical Assessment (global and selected legislations)	Person
P45 (UK Oracle Payroll)	Assignment (employee)
People Folder	None

Window	Context Required
People	None
People Management template Maintenance window	None
Performance	Assignment (employee)
Person Type Usage	Person
Personal Payment Method	Assignment (employee)
Phone Numbers	Person
Picture	Person
Position	None
Position Occupancy	Position
Previous Employment	Person
Qualifications	Person
QuickPay (Oracle Payroll)	Assignment (employee)
Reverse Payroll Run (Oracle Payroll)	Assignment (employee)
Salary Administration	Assignment (employee)
Salary History	Assignment (employee)
Schools and Colleges (Establishment Attendances)	Person
Secondary Statuses	Assignment
SOE Report (UK Oracle Payroll)	Assignment (employee)
Special Information	Person

Window	Context Required
Statement of Earnings (Australian and New Zealand legislations)	Assignment (employee)
Statutory Details (UK Oracle Payroll)	Assignment (employee)
Supplementary Roles	Person
Terminate	Person (employee)
Terminate Applicant	Person (applicant)
View Element Entry History	Assignment (employee)
View Employee Accruals (US legislation only)	Assignment (employee)
View Employee Benefits (US legislation only)	Assignment (employee)
View Employee Earnings & Deduction Balances (US Oracle Payroll)	Assignment (employee)
View Employee Tax Balances (US Oracle Payroll)	Assignment (employee)
View SOE (US Oracle Payroll)	Assignment (employee)
Work Choices (Job or Position)	Job or Position
Work Choices (Person)	Person
Work Incident (global and selected legislations)	Person

Including the Assignment Window

When users move down a task flow from the combined People and Assignment form, the Assignment window remains visible in the background. They can return to the Assignment window by closing their current window. Therefore you should not define a button to call the Assignment window.

However, if you are defining a task flow to the Assignment window from any window

except the People window, you should use the Assignment form (PERWSEMA). In this case you can add an Assignment button to any forms below the Assignment window in the task flow. This enables users to return to the Assignment window without going back to the top window.

Task Flow (Oracle Workflow)

As an alternative to using forms to set up and maintain task flows, you can model your task flows using Oracle Workflow (version 2.0.3.8.1 or higher) then generate a task flow. This method of creating task flows has the advantage of using a diagrammer to help you design the sequence of windows.

> **Note:** When you create a task flow using Oracle Workflow, you must continue to maintain it using Oracle Workflow. You cannot edit a generated task flow using the Define Task Flow form.

Oracle HRMS supplies the HR Task Flow item type and a function activity for every window that can be task flowed. You model these into a workflow process for each task flow. By setting activity attributes, you create button labels and the position of buttons on each window.

Key Rules

There are two key rules in defining task flows:

- Only certain windows are valid first windows (or top nodes) in a task flow. To check which windows are valid first windows, check the lookup types using Oracle Workflow Designer.

  When you create a workflow process to model your task flow, your Start activity must connect to the Top Node Selector activity. This activity ensures that your first window is valid.

- Each window in a task flow can only be connected to a window that supplies the correct context.

  For example, the Position Occupancy window requires the context of a position, while the Qualifications window requires the context of a person. Each workflow activity supplied for a window has its Result Type set to a lookup type that defines the context that must be passed to it. For example, the F4 Enter Address window has the Result Type set to Person Context Windows. This means it must be given the context of a person.

  Task flows are associated with one of the following contexts:

  - Assignment

- Element Entry
- Job
- Location
- Request for Personnel Action (US Federal HR)
- People
- Position Description (US Federal HR)
- Position
- Top node HRMS windows

Creating Task Flows Using Forms

Complete the following steps to create task flows using forms:

1. Define Task Flow Nodes, page 3-148
2. Define Task Flows, page 3-149

   You can also complete these optional steps, if required:

3. Copy an Existing Task Flow, page 3-151
4. Add a New Window to an Existing Task Flow, page 3-151
5. Amend the Navigation of a Task Flow, page 3-152

Defining Task Flow Nodes

Each form in a task flow is a *node*. There are predefined nodes for every form that you can include in a task flow. However, if you create a configured version of one of these forms, you must create a node for the configured version before you can include it in a task flow.

> **Tip:** If you want to use a configured form as the first node in a task flow you should define this as a new node.
>
> You could add both the task flow and the configured form as arguments to a single menu function but this may be more difficult to maintain.

You create nodes in the Define Task Flow Nodes window.

To create a task flow node:

1. Enter a name for the node. You select this name when you create a task flow containing the node. It is not visible to users.

   Caution: Do not use apostrophes or "%" symbols in the node name.

2. Select the name of the form that you configured. Leave the Block field blank.
3. Select the name of the configured version of the form that you created.
4. Save the new node.

Defining Task Flows

You define task flows in the Define Task Flow window. If there is a similar existing task flow, you can copy it to form the basis of your new flow.

Tip: When defining the navigation buttons in your task flows:

- Do not define long sequences where you cannot go back to the previous step
- Use the same button names for the same nodes
- Use different button names for configured nodes

Before you can include the task flow in a menu, you must define a new menu function for the first form in the task flow with the following argument in the Parameters field:

WORKFLOW_NAME = "*task flow name"*

To define a new task flow:

1. Enter a name for the task flow and save it.

   Caution: Do not use apostrophes or "%" symbols in task flow names.

   Note: Do not choose the Convert button. This is provided only for converting task flows you created in Oracle Workflow. See:

2. Select a legislation for the task flow from the list of values, or leave the legislation field blank to create a global task flow.

3. In the Node block, select the name of the node that you want to be the first form in the task flow.

4. For this node, select the Top Node check box.

5. Create a new record in the Node block and select another node. You must create all the nodes for the task flow before you can begin entering the navigation paths between them.

6. In the Navigation Options region, for each node, select the other nodes to which you can navigate.

7. Enter a sequence number to determine the order in which the navigation options appear as buttons (from left to right) along the base of the window or as options in a navigation list.

8. Select the Button check box for the navigation options that should appear as buttons. There is a limit on the number of buttons that can appear on each form. This number varies from form to form.

   The other options are displayed in a navigation list when the user chooses a button labelled Others. Or, if there is only one other option, this form displays when the user chooses a button labelled Next.

9. There is a default label that appears on buttons or in the navigation list for every form. You can override this with your own label.

   If the label in the Define Task Flow window appears blue, this is the default value. It is a dynamic default: if the seeded value changes (for example, as the result of an upgrade), the label will be updated automatically in all task flows where it has not been overridden.

   If the label appears black, the default value has been overridden. To re-inherit the default label, clear the field.

10. To define an access key (or keyboard shortcut) for a navigation option, precede the appropriate letter in the label with an ampersand (&). For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Picture window, enter the label &Picture.

    Note: Do not use the following letters, as they are used on the

Oracle Applications menu: A, E, F, G, H, Q, S, W.

There is no validation to prevent the same letter being used more than once for a group of buttons.

11. Save the task flow.

Copying an Existing Task Flow

To copy an existing task flow:

1. Query the existing flow and choose the Copy To button.
2. Enter the name of the new task flow and choose OK.
3. Query your new task flow and edit it as required.

Adding a New Window to an Existing Task Flow

You can use the Define Task Flow window to add a new window, using its node name, to an existing task flow. If you have already used the window in the task flow you only have to amend the navigation, see: Amending the Navigation of a Task Flow, page 3-152

> **Note:** If you have created a task flow using Oracle Workflow, you must continue to maintain it using Oracle Workflow. You cannot edit a generated task flow using the Define Task Flow window.

To add a new window to an existing task flow:

1. Query the task flow you want to amend in the Name field.
2. In the Node block, enter the window's node name.
3. Save your changes.

   You must now include the node in the navigation path for the task flow.
4. Select the existing node you want the new node to be accessed from in the Node block.
5. Enter the new node`s details in the Navigation Options region and edit the existing navigation path as required. For information about how to set up the Navigation Options region refer to steps 5 to 9 in "To define a new task flow", page 3-149.

Amending the Navigation of a Task Flow

Use the Define Task Flow window to amend the navigation of a task flow.

To amend the navigation of a task flow:

1. Query the task flow for which you want to amend the navigation in the Name field.
2. Select the node name in the Node block.
3. Edit the existing navigation path in the Navigation Options region, as required. For information on the Navigation Options refer to steps 5 to 9 in To define a new task flow, page 3-149.

Generating a Task Flow From Oracle Workflow

After modeling a task flow in Oracle Workflow and saving it to the database, you must generate task flow definitions.

Use the Define Task Flow window from the HRMS application.

To generate a task flow from Oracle Workflow:

1. Query the task flow(s) you have created and choose the Convert button.
2. Choose OK to convert the task flows from Oracle Workflow.

   Oracle HRMS indicates how many task flows have been successfully converted. If any task flows have not been converted, these are identified and are not saved to the database. You must correct the errors then verify, save and regenerate the task flows again.

   Note: Having modeled a task flow in Oracle Workflow, you cannot edit it using the Define Task Flow window. You must make any edits using Oracle Workflow, save it and then regenerate the task flow definitions.

Creating Task Flows Using Workflow

Complete the following steps to create task flows using Oracle Workflow:

1. Create a Top Level Process, page 3-153
2. Create Sub Processes, page 3-154

3. Create Button Labels, page 3-155

4. Position Button Display, page 3-156

Combined People and Assignment Form Only

If you are creating task flows using the combined People and Assignment form, you have an additional step to perform:

5. Identify Windows or Blocks to Display, page 3-157

Configured Versions of Forms Only

If you have created a configured version of a form, you have an additional step to perform:

6. Identify Configured Forms to Include in the Task Flow, page 3-157

All Forms

7. Verify and Save the Workflow, page 3-157

8. Generate a Task Flow From Oracle Workflow, page 3-152

Creating a Top Level Process

You must define a top level process for each task flow. The top level process can contain sub processes, but not any other top level processes.

A top level process must have a Top Node Selector activity. This ensures that the first window in a task flow is a valid top node window. All windows that can be a top node are defined within the Top Node HRMS Context Windows lookup type.

The Top Node Selector must have two transitions. The first transition must go to the Top Node activity and its value must be the window activity name. The second transition must be <Default> and go to the end activity.

You use the Process Diagrammers within Oracle Workflow to create your task flows. You do this by adding and connecting the windows you want to appear.

To create a top level process:

1. Enter a unique internal and display name for the new process for the HR Task flow item type.

   Tip: Use a naming convention for Internal and Display names. For example, a good internal name might be POSITION_DETAILS_TL with a Display name of Position Details (Top Level).

2. Define the process as runnable.

3. Open the Process Diagrammer window and add one Start activity and at least one End activity.

4. Add a Top Node Selector activity. The Start activity must connect to the Top Node Selector activity.

5. Connect the Top Node Selector to the End activity with a <Default> transition result value.

6. Add the Top Node window.

7. Connect the Top Node Selector to the Top Node window, specifying the name of this window activity as the transition result value.

8. Connect the Top Node window to the End Activity with a <Default> transition result value.

9. Add other windows to the process, noting the following rules:

   - A window can only connect to another window where the result type is the same (such as, both Person Context windows).

   - The transition result value must be the name of the window activity you are connecting to (for example, F4 Enter Assignment).

   - Each window can only connect once to any other window.

   - Each window must be connected to the Top Node window with a <Default> transition result value.

   - You can connect a window back to its parent using the <Parent> transition result value, rather than the name of the parent window.

Creating Sub Processes

You can group a logical set of task flow windows into a sub process, which can then be used by several top level processes. This simplifies process modelling. Each sub process can contain other sub processes. There are two rules to note regarding sub processes:

- A sub process cannot be defined as runnable.

- When you use a sub process in another process, you must connect the sub process to the Top Node window.

To create sub processes:

1. Enter a unique internal and display name for the new process for the HR Task flow item type.

   Tip: Use a naming convention for Internal and Display names. For example, a good Internal name might be ASSIGNMENT_DETAILS_SL with a Display name of Assignment Details (Sub Level)

2. Define the process as NOT runnable.

3. Specify a user defined result set as a Process Result Type if the sub process requires more than one result value.

4. Open the Process Diagrammer window and add one Start activity and at least one End activity

   Because a process can have more than one result value, many End activities may be required. At least one End activity is required to indicate that the process must connect back to the Top Level node window.

5. Connect the Start activity to another window.

   Note: The Start activity can connect to one window only.

6. Add other windows to the process, noting the following rules:

   - A window can only connect to another window where the result type is the same (such as, both Person Context windows).
   - The transition result value must be the name of the window activity you are connecting to (for example, F4 Enter Assignment).
   - Each window can only connect once to any other window.
   - Each window must connect to an End Activity with a <Default> transition result value.
   - You can connect a window back to its parent using the <Parent> transition result value, rather than the name of the parent window.

Creating Button Labels

You can enter the label you want to appear on the task flowed forms, for example,

Photo (for the Picture window). Each task flow window activity has an attribute called Button Label. Use this attribute to override the default button label for a window and to define an access key (or keyboard shortcut).

To create button labels:

1. Display the process in the Oracle Workflow Process Diagrammer.
2. Select the activity by choosing Edit - Properties. (You can also double click on Edit - Properties to select it).
3. Select the Attribute Values tab frame.
4. Enter the label you want to appear on the forms.

   Precede the appropriate letter in the label with an ampersand (&) to define an access key. For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Picture window, you could enter the label &Photo.

Positioning Button Display

You can position the display order of buttons on the form. For example, you might want the first button to display the Picture window.

The number of task flow navigation buttons that can be displayed on a window varies from window to window. If there are too many navigation options for them all to appear as buttons, the last button on the window is called Other and it displays a list of values containing the other navigation options.

You determine the navigation options available from a window by defining transitions to other windows in the Process Diagrammer. Now you can use the activity attributes Display Button 1..4 to specify which navigation options should display as buttons and the order in which they should appear.

To position buttons:

1. Display the process in the Oracle Workflow Process Diagrammer.
2. Select the activity by choosing Edit - Properties. (You can also double click on Edit - Properties to select it).
3. Select the Attribute Values tab frame.
4. Enter the name of the window you want to display on the button for the Display Button 1 attribute.

   For example, if you want the first button to display the Picture window, enter F4 Enter Picture. If the window is the parent window then you can specify the <Parent> special connection value.

5. Repeat step 4 for the attributes Display Button 2 .. 4. If you do not want a button to appear on the window, enter the value <Null>.

   For example, if you only want three buttons to be displayed, enter <Null> as the value for Display Button 4.

Identifying Windows or Blocks to Display

For most task flow forms, you must display the first block of the form on entry. However, when you use the Combined People and Assignment form in a task flow, you must specify whether to display the People window (or block) or the Assignment window on entry.

To identify windows or blocks to display:

1. Display the process in the Oracle Workflow Process Diagrammer,
2. Select the window activity by choosing Edit - Properties. (You can also double click on Edit - Properties to select it).
3. Select the Attribute Values tab frame.
4. Enter the name of the block you want to display on entry for the Block Name attribute.

Identifying Configured Forms to Include in the Task Flow

If you have created a configured version of a window, you can use it in a task flow.

To identify configured forms to include in the task flow:

1. Display the process in the Oracle Workflow Process Diagrammer.
2. Select the window activity by choosing Edit - Properties. (You can also double click on Edit - Properties to select it).
3. Select the Attribute Values tab frame.
4. Enter the name of your Form Customization for the Customization attribute.

Verifying and Saving the Workflow

When you have completed the task flow definition within Oracle Workflow, use the Workflow Verify function to check that your workflow conforms to Oracle Workflow modeling rules.

When you have successfully verified the Workflow, save it to the HRMS database.

To verify and save the Workflow:

1. Choose File - Verify.

   Note: This process does not check that you have created a valid task flow. This check is done when you generate the task flow.

2. Choose File - Save.

Transferring Task Flows Between Databases

You can transfer a task flow you have created in one database (using either Forms or Workflow) into another database; for example, to add a task flow created in a test database to a live database. You do this by exporting the task flow information from the first database to a flat file which you can then import to the second database.

You do this using the Submit Request window.

Important: Before transferring task flows into a database, you must ensure that all windows used by the task flow are present in the database. This includes any versions of windows that you have configured using CustomForm or the People Management Configurator.

To export a task flow to a file:

1. Log in to the source database.

2. In the Submit Request window, choose Download HRMS Taskflows from the list of values in the Name field.

3. Enter a name for the file in which to save the task flow in the Data File parameter field. The recommended file extension is .ldt.

   Tip: To avoid having to move the file before importing it to the target database, include the full file path of a location that is accessible to both the source and target databases.

4. To download a single task flow, select the task flow name from the list of values (you can download all task flows for a legislation, or all global task flows, by leaving the task flow field blank).

5. To download task flows for a particular legislation, select the legislation from the list of values. To download global task flows, leave the legislation field blank.

6. Choose OK, then choose Submit, to save the task flow to a flat file.

To import a task flow from a file:

1. Log in to the target database.

2. In the Submit Request window, choose Upload HRMS Taskflows from the list of values in the Name field.

3. Enter the name of the file containing the task flow in the Data File parameter field.

4. Choose OK, then choose Submit, to import the task flow to the database.

5. You can now use the task flow in the same way as in your original database.

Configure Windows Using the People Management Configurator

People Management Configurator

You can use the People Management Configurator tool (formerly called Forms Configurator) to design windows that closely meet the business processes of your enterprise. For example, you can design windows to contain the essential information you need to hire a new person. This saves time, reduces errors, and makes data entry and maintenance easier.

Predefined templates are provided with Oracle HRMS. These are examples of windows that have been designed with specific processes in mind. The predefined People Management templates have been created using the People Management window. The example templates use selected items from this window. However, you can select any item from the People Management window when you create your own windows.

See People Management Templates, page 3-162.

Why Use a Predefined Template?

You can create new windows without using a predefined template but we recommend that you use one as a guide for the following reasons:

- The templates have been carefully designed to represent typical business processes and show a good implementation of window design.
- It makes it easier to upgrade to new predefined templates when they become available. When you upgrade a predefined template the system makes the necessary core updates but leaves any changes you have made to the template in place.

What Can I Change On a Template?

When you design a new window using a template, you can:

- Choose which component windows (Summary, Find, Maintenance) of the main window to display, and where they are positioned.
- Choose which window displays first when a user chooses the main window from the navigator.
- Select which tabs, fields, and buttons you want displayed on each window.
- Choose to maintain worker information across business groups.

- Choose where fields are positioned, on which tabs they appear, and the field tabbing order.
- Choose to default values in fields.
- Use formulas to supply additional details about a field or button to be displayed when a user right-clicks on the item.
- Set up context-sensitive fields such as address styles so that the appropriate fields are displayed depending on a value chosen.
- Enable display of DateTrack History on datetracked fields.
- Define data restrictions such as Employees only, Applicants only or Contingent Workers only.
- Set up checklists for users to record the progress of actions. You can add values to the predefined lookups: CHECKLIST_ITEM and CHECKLIST_STATUS.
- Create notification messages for users to send workflow notifications to other people. Some messages are predefined.

  Note: The online help reflects the predefined templates. If you configure the forms, you might need to edit the help to reflect the changes you make.

Additional Configuration Options For People Management Templates

A number of user extensible 'custom' fields have been added to the People Management templates which enable you to maintain any data that you cannot currently maintain using the templates (either Oracle E-Business Suite data items or 3rd party/custom data items that are stored within the database). These fields only apply to the People Management window (PERWSQHM form) and are only available on the 'MAINTAIN' block/window (not the summary or Find window).

You can add these custom fields to the People Management Configurator template via the Forms Configurator option. There are a number of different types of fields to accommodate different functional requirements. These fields are :

- Character
- Number
- Date
- Check Box

- List of Values
- List Item

  These additional fields are referred to as items and they can be placed on to the template using the People Management Configurator (see Fields on the People Management Window, page 3-184 for further information).

  When you have added the required custom items to the template, it is necessary to use the Custom Library to write the required business rule code and logic for the retrieval, update and validation of each custom item.

  For further information please see the white paper *Further Configuration Options For People Management Templates* on MetaLink.

Setting Up Task Flows To Other Windows

You can add task flow buttons to access other windows from the Maintenance window of your configured window. Create the task flow using Oracle Workflow or the Task Flow windows, then view the window with the buttons in the People Management Configurator.

If you want to reposition or resize the buttons on the window, you need to add the button items to your template using the People Management Configurator, place them in the appropriate positions, set their size, and enter labels for them.

People Management Configurator User Interface

The People Management Configurator tool contains a graphical navigation tree and a set of properties. The navigation tree has been set up in a logical order so that if you follow the tree down from the top, that is the order in which you should complete your tasks. Expand the template name to see the information associated with the template.

You can see what your windows look like on the screen as you make edits to them. You can also preview the windows in your template to test out the fields and tabbing and see how they will appear to the user.

People Management Templates

The predefined People Management templates have been designed to help you create windows that match your business processes. These templates were created from the People Management window using the People Management Configurator. The predefined template windows are available on the Navigator; you can use these without making changes. Alternatively, you can make copies of the predefined templates and modify them to create your own windows, or you can create entirely new templates.

For details of the predefined templates, see Predefined People Management Templates, page 3-166

What Information Is Included In the Templates?

The predefined templates have been designed for generic business processes, such as hiring a person or creating a new applicant. For example, when you go through the hiring process, you typically have to open lots of windows to complete the task. With a template window, all the data can be put together and grouped into logical sections using the tabbed regions.

When an applicant is hired, assignment information from the application is automatically entered on the employee assignment.

Designing Your Own Templates

The People Management window contains all the personal and assignment information, such as LAST_NAME and VACANCY. You use the templates to control what the user can see by only including what you need.

See Fields on the People Management Window, page 3-184 for a complete list of all the fields available for you to use when creating People Management templates.

How Many Windows and Tabs Can I Design?

A template can consist of a Find window, Summary window, and Maintenance window. You can modify each of these windows to suit your requirements. You can design as many templates as you require, targeted at different tasks or user groups. For example, for users who only need to review information, you design a template that provides a Summary window. For users who need to update information, you can provide a Maintenance window too.

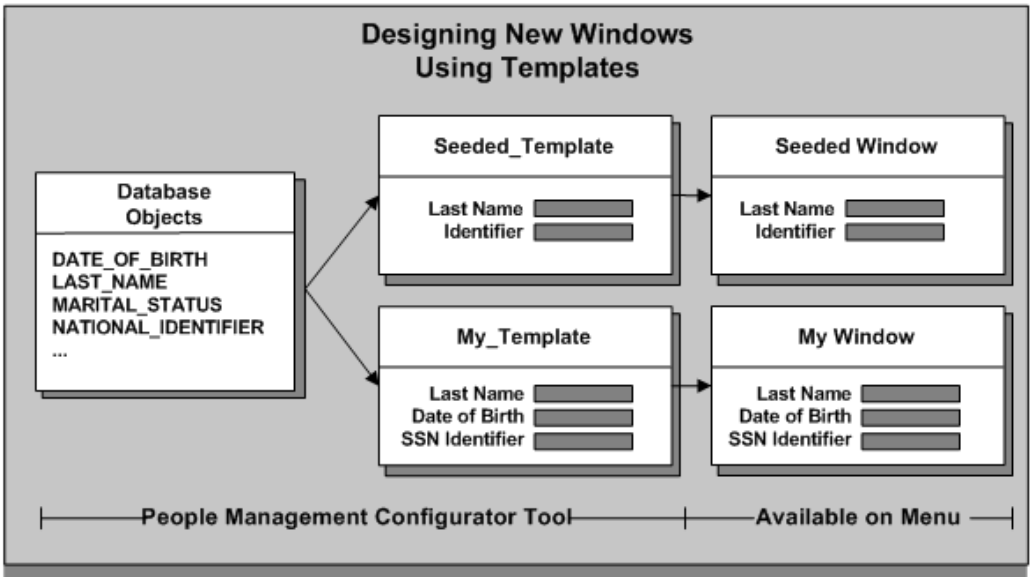
When you have created a new template, you add it to the Navigator so that your users can access the new windows. For each template, you can set up which window is displayed first. For example, you can specify that choosing People Maintenance from the Navigator displays the Find window first to enable users to find a person. Then they can navigate to the Maintenance window by choosing the Show Details button.

The Find window can contain up to six tabs. One tab has been defined as the Advanced tab but you can use this for another purpose if you want.

The Summary window can contain up to ten tabs. One tab has been defined as the Checklist tab but you can use this for another purpose if you want.

The Maintenance window can contain up to ten tabs, including the Extra Information Types, and Special Information Types tabs. One tab has been defined as the Checklist tab but you can use this for another purpose if you want.

Using Templates to Design Process Based Windows



How Do I Control What Users Can Do With a Template?

Some restrictions are made using the People Management Configurator tool, and others using CustomForm. For example, you use the People Management Configurator to determine the fields, buttons, tabs, and windows available. You can also restrict a template to the Employee, Applicant or Contingent Worker system person types using the People Management Configurator.

You can use CustomForm to:

- Specify the user person types, special information types, and extra information types that users can view or enter
- Specify the actions that users can perform, and the notifications they can send
- Remove fields from the list available for searching on the Advanced Find tab
- Restrict the types of person record users can create using the template: new applicants, employees, contingent workers, applications, employee assignments, or contingent worker assignments.

  Important: You must be careful to create consistent restrictions. For example, it would not be consistent to restrict a template to Applicants Only using the People Management Configurator, then add a CustomForm restriction that only allows users to enter new employees or employee assignments.

Benefits of Using Template Windows

Templates provide the following advantages for your users:

- They can find information using the basic and advanced queries on the configurable Find window. You specify which fields appear in this window and in what order.
- They can save result sets to folders for repeated use in future work sessions.
- They can work more quickly if you use the templates to:
  - Hide information they do not need
  - Provide defaults where possible
  - Position fields in logical groups and on tabbed regions
- They can use the checklists to track the status of actions that you have defined as relevant to the template.

Using templates is only one part of making Oracle HRMS specific to your enterprise. You can also sequence windows together in task flows. You can define a Maintenance window to be the top window and provide buttons for navigating directly to other windows while the Maintenance window remains in the background.

People and Assignments in the Data Organizer

The Summary window of the people management templates includes the Data Organizer, which helps you find and organize information about people and assignments.

The Data Organizer can display people organized alphabetically by name, organization, or job. When you expand a person's node in the Data Organizer, you see a list of their employee, applicant, and contingent worker assignments. Assignments do not have names, so you can choose what information appears in this list to help users identify the assignment they want to work with.

By default, assignments are identified as <job>.<organization>, such as Senior Manager.Engineering. However, you can choose any other database items to display in the Data Organizer. The same information appears in the Assignment field that you can display on the Maintenance window.

If you want to override the default, write a formula to return the text to be displayed. See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*

Defaulting Values in Template Fields

The templates enable you to default values in as many fields as you want. You can make data entry easier for users by defaulting items that frequently take the same value. Where the value is constant, you might set a default and then hide the field from users.

When an applicant is hired, assignment information from the application is automatically entered on the employee assignment.

Defaults from Other Windows

When you set up information for your implementation in Oracle HRMS windows, you can specify that values in some fields are automatically defaulted by the system when the user selects a value in another field. For example, you can set up default information for business groups in the Organization window, so that selecting a business group populates the fields for Location, Working Hours, Frequency, Start Time, and End Time. You can also specify default information in many fields for a position or vacancy in the Positions window and the Requisition and Vacancy window.

If you set defaults for these fields using People Management Configurator, they will be overridden by the automatic defaults set up in these windows.

Defaults in Dependent Fields

Some fields are dependent on other fields, so that when the user enters a value in the main field, they must always enter a value in the dependent field. For example, if the user enters a value for Notice Period, they must enter or select a value for Notice Period Units.

You cannot set default values in the dependent fields.

Information on the fields that are dependent on other fields is included in the list of Fields on the People Management Window, page 3-184

Predefined People Management Templates

Oracle supplies a number of predefined People Management templates. We recommend that you base any new window design on one of these templates.

> **Note:** You can create an entirely new template but there are many issues to be aware of such as upgrading and setting up context-sensitive address styles. Instead, we recommend that you copy a predefined template for your localization and make any changes to that.

Templates are provided for specific localizations. There are also generic templates for you to use if none of the predefined localization-specific templates meet your

requirements.

Hiring Applicants Template

This template enables you to create windows for entering an applicant, tracking the applicant up to the point of hire, and hiring the applicant. You can use the Hiring Applicants window for the complete hiring process. You can access both employees and applicants in this template. This enables you to hire applicants and to process internal applicants.

Enter Employees Template

This template enables you to create a Maintenance window for quickly entering details of employees, and their primary assignment. It is restricted to employees only. This window is designed for users who have lots of employees to enter who do not need any applicant history, for example, a one day casual hire.

You can enter basic personal details such as name, date of birth and address as well as assignment details such as job, grade, and salary. The Notify button enables you to send notifications about actions to other people.

Maintain Employees Template

Use this template to create windows for entering or maintaining full employee details. It is restricted to employees only. This is very similar to the tasks you would perform using the People window and associated windows.

Enter Contingent Workers Template

This template enables you to create a Maintenance window for quickly entering contingent worker details and their primary assignment. It is restricted to contingent workers only. This window is designed for users who have lots of contingent workers to enter.

You can enter basic personal details such as name, date of birth and address as well as assignment details such as job, supplier, and worker number. The Notify button enables you to send notifications about actions to other people.

Maintain Contingent Workers Template

Use this template to create windows for entering or maintaining contingent worker details. It is restricted to contingent workers only. This is very similar to the tasks you would perform using the People window and associated windows.

Visa Administration Template

This template enables you to create windows for entering information about foreign

workers. You can record details about an employee's addresses, contacts and visa details.

HR Foundation Template

The HR Foundation template enables you enter and maintain contingent workers using the HR Foundation responsibility. The HR Foundation template is restricted to contingent workers only and is used for tasks very similar those tasks you would perform using the entering and maintaining contingent workers templates.

Find Window Configuration

There are two parts to a Find window, and you can choose the fields that appear on each:

- Find tabs where users enter their search criteria
- Find Folder where the results of the search are summarized in a one-row-per-record format

Find Folder

In the Find Folder, include fields that will enable users to uniquely identify the records they need. Typically these fields are Full Name, Employee or Applicant Number, National Identifier (such as Social Security Number) and Date of Birth.

Find Tab

Put the fields in which you expect users to search most frequently on the Details Find tab (the tab to display first). To provide fast search results, we recommend that some of the following fields are available for searching:

- Last Name
- Employee Number
- Applicant Number
- National Identifier
- Full Name

Fields that have lists of values also provide good search performance.

The predefined templates include the Effective Date field on the Details tab. You can use this field to change your effective date without using the calendar icon from the toolbar. The effective date determines the lists of values available on fields in the Find

window and which records will be returned. If you are going to include this field on the Find window, it is best to place it at the top of the window. This encourages users to set their effective date first, and then select from the appropriate lists of values in the other Find fields. You can include up to six Find tabs.

Advanced Find Tab

You can provide an Advanced Find tab (as one of the six Find tabs) for more complex searches, such as matching ranges of values. To construct an advanced tab you need to include the following fields, where *n* = 1 to 5:

- Field *n* Name

  This field enables you to select a field on which to perform an advanced search.

- Field *n* Condition Code

  This field defines the operator for the search, for example, not equal to, less than, greater than.

- Field *n* Value

  This field is the value you want to search on.

For example, you could set up the following query, find me all people whose hire date (field name) is less than (condition code) 1-Jan-1999 (value).

You can restrict the fields that users can select in the Field *n* Name fields using CustomForm. You can therefore remove the ability to search on sensitive or confidential fields.

Security Check Box on Find Window

There is a Security check box on the Find window that defines which people are included in a user's search. To find people from outside your Security profile, you must ensure that the Security check box is enabled and is unchecked. However, they will not be able to view full information for people outside their security profile, and they will not be able to update these records.

If you leave this box unchecked, you must be careful that no confidential information is included in the Results of the Find. We recommend that you always check this check box.

If you do not want users to be able to change the security profile set for the template then you should set the Security check box to the required setting and then hide it, thus preventing users from updating it.

Although the Security check box defines which people are included in a search, it does not define what can be saved from the Find window into the Data Organizer, as this is controlled by the user's security profile. This means that if you have the check box unchecked, your user may find that they cannot save some data that is returned in a

query into a folder as it is outside their security access. The Data Organizer is also limited depending on the person type restrictions set up at template level.

If you delete the check box from the search criteria, the results will only display those people from within your Security profile.

The Business Group Field on the Find Window

If you want to use the Business Group field to query and update worker information across business groups, then you must associate a global security profile to your responsibility. If you do not use a global security profile, then you can view the business group of the worker you searched for, but you cannot use the Business Group field in the Find window to search for workers.

SITs, EITs and Other Flexfields in Templates

Maintenance windows in your people management templates can include tabs for entering Special Information Types (SITs) and person and assignment Extra Information Types (EITs).

These tabs must contain a drop down list to enable the user to select the appropriate SIT or EIT to enter. This poplist controls the segments of the flexfield that display. In the People Management Configurator, you select the item Special Information Type List (Special Information), or Extra Information Type List (Extra Info), to enable this poplist.

You select which segments of the flexfield are displayed. Each segment is displayed as a folder form column. At run time, the window displays the appropriate columns with no gaps where segments are not displayed.

> **Note:** You can control which SITs or EITs a user can select in the template by creating a CustomForm restriction that you associate with the template when you add it to a menu.

Segments Using Value Sets

Each segment item for a flexfield has two entries, one called *meaning* and one called *value*. The value item is always required as this is where the user would enter or select the information. The meaning item is only used where the user selects a value from a value set. If the value set uses a short meaning and a longer description, you can include the meaning item to display this longer description when the user selects a value.

For example, you may have a segment in a flexfield that records a country of residence. In the value field the user may select a country short code, USA, and in the meaning field the longer description, United States of America, would be displayed.

How Segment Properties Are Derived From Template and Flexfield Definitions

When a user selects an SIT or an EIT type from the list, the item properties for each segment depend on the settings defined for the template *and* the flexfield:

- Case Restriction, Default Value, Prompt Text, Width

  If these properties are set in the template, these values are used. If not, the values set for the flexfield are used.

- Enabled, Insert Allowed, Update Allowed, Visible

  If the value for these properties is set to Yes on the flexfield, and is set to Yes or blank on the template, then these properties are set to Yes. Otherwise these properties are set to No.

- Required

  This property is set to Yes if it is set to Yes on *either* the template or the flexfield. Otherwise it is set to No.

Some of the properties rely on other properties being set to appropriate values for them to take effect. For example, if the Required, Insert Allowed, or Update Allowed value are set to Yes, this will only take effect if the item is enabled and visible.

Note: These rules apply to all flexfields, not just SITs and EITs.

Positioning Columns in the SIT Folder

We recommend that you place the items Date from (Special info) and Date to (Special info) first in the folder. Then place all of the Special Information Segment *n* Value items (where *n* is 1 to 30) onto the tab in consecutive order.

As it is a folder form, you must also include the record indicator for the multi row block. This item is called Current Record Indicator (special info). Make its width 0.1", and make it appear just before the first Date field.

Positioning Columns in the EIT Folder

We recommend that you place all Extra Information segments onto the tab in consecutive order. Assignment EITs are called Assignment Extra Information *n* Value items (where *n* is 1 to 30), and person EITs are called Person Extra Information *n* Value items (where *n* is 1 to 30).

The actual positioning of the EIT segments on the tab is not important as when the window is accessed by a user the first populated EIT segment is displayed flush against the current record indicator and all others are lined up against it.

As with the SIT folder, you must include the record indicator for the multi row block.

This item is called Current record indicator (Extra info). Make its width 0.1", and make it appear just before the first EIT segment field.

Other Flexfields

You can include user-defined descriptive flexfields (DFs) and developer descriptive flexfields (DDFs) in both the Summary and Maintenance template windows. You can include individual flexfield segments directly in the template window in the same way that you would add normal fields (segment properties are the same as those described for EITs and SITs); alternatively you can include the whole flexfield in a flexfield popup window, by selecting the *Flexfield Name* Popup item. If you want to include multiple flexfields in your templates, you can include segments from some directly within the template, and add flexfield popup windows for others; however, you cannot include flexfield segments and a popup window for the same flexfield structure.

We recommend that you do not add too many flexfield segments directly to the template as this will impact performance. It is better to include whole flexfields as popup flexfield windows.

Context-Sensitive Fields In Templates

You can set up fields that are context-sensitive in your templates using the People Management Configurator tool. For example, you might want to display the Employee Number field when the selected person is an employee, and the Applicant Number field for an applicant.

You can also use this feature to display the appropriate segments of a flexfield. For example, you set the context to display the appropriate structure of the Personal Analysis Key Flexfield for the selected Special Information Type. You do not have to display the full structure defined in the flexfield. You can hide segments to save space on the template, or for security reasons.

You set up each context as a 'child' item under the main item in the People Management Configurator navigator. For example, if you want Post Code to display in three address style contexts, you define three context items under the Post Code item If you hide the 'parent' items, there will be a blank area of the window when it opens. This area is populated by the context sensitive fields (such as address lines) when the user selects the appropriate context (such as an address style). The fields that are displayed, their position, size, defaults, and all other properties can vary with the context.

If one context is more common that the others, you can set that context as the default in the field where the context is chosen. Then there is no blank area when the window opens, because it contains the fields appropriate to this default context. For example, you might set your local address style as the default so that the appropriate address lines for local addresses are displayed by default.

Online Help Targets for Templates

When you are defining your template you can add your own help target to display a particular help topic in the online help. This will override the default context-sensitive help call of the *form.window* name.

If you enter a help target for the template this will override the *form* section of the default help target. The *window name* will still be appended to this target depending on from which window the user accesses help.

> **Note:** If you define a new help target for your template **none** of the supplied online help for the template will work. You will have to update your help files to include your new help target.

The window names that can make up the People Management templates are:

- SUMMARY_WINDOW
- FIND_WINDOW
- MAINTAIN_WINDOW
- ACTION_WINDOW
- CREATE_WINDOW
- NOTIFY_WINDOW

For example, the default target that is generated when a user calls help from the Summary window of the Hiring Applicants template is PERWSQHM.SUMMARY_WINDOW. If you have defined a help target of "HIREAPP" for the Hire Applicants template, then when a user calls help from the Summary window the target that is generated is HIREAPP.SUMMARY_WINDOW.

Notification Messages Issued From Template Window

When users choose the Notify button on a template window, they can select a message and a person or role to send it to.

Predefined Messages

The following table shows predefined notification messages. You can create additional messages using Oracle Workflow or delete any that are not relevant to your enterprise.

Display Name	Internal Name
Change of employment for supervisor	SUPERVISOR_JOB_CHANGE
Change of Supervisor	CHANGE_SUPERVISOR
Employee Transfer	EMPLOYEE_TRANSFER
Employee Transfer - Notify Payroll	PAYROLL_INT_HIRE
New Contingent Worker Notification	NEW_CWK
New Hire Notification	NEW_STARTER
New Hire Notification (US)	US_NEW_STARTER
Notify Payroll with New Hire Details	PAYROLL_NEW_STARTER
Probation Period is close to expiry	PROBATION_PERIOD_EXP
Relocation Notification	RELOCATION_NOTIFICATION
Request Security Card	SECURITY
Employee Transfer (US)	US_EMPLOYEE_TRANSFER
Notify Payroll with New Hire Details (US)	US_PAYROLL_NEW_STARTER
Employee Transfer - Notify Payroll (US)	US_PAYROLL_INT_HIRE
Relocation Notification (US)	US_RELOCATION_NOTIFICATION
Visa Expiry Notification to Supervisor	GLB_SUP_VISA_EXP_WARN
Visa Expiry Notification to Employee	GLB_EMP_VISA_EXP_WARN
Visa Expiry Notification to Employee (US)	US_EMP_VISA_EXP_WARN
Visa Expiry Notification to Supervisor (US)	US_SUP_VISA_EXP_WARN

Message Tokens

Notification messages can include the following tokens:

- HIRE_DATE
- FULL_NAME
- PER_EFFECTIVE_START_DATE (Person Effective Start Date)
- TITLE
- FIRST_NAME
- LAST_NAME
- EMPLOYEE_NUMBER
- APPLICANT_NUMBER
- NATIONAL_IDENTIFIER
- ORGANIZATION
- GRADE
- JOB
- POSITION
- PAYROLL
- VACANCY
- SUPERVISOR
- ASG_EFFECTIVE_START_DATE (Assignment Effective Start Date)
- LOCATION
- SALARY
- SALARY_CURRENCY
- PAY_BASIS
- DATE_PROBATION_END

- NPW_NUMBER (Contingent Worker Number)
- START_DATE (Contingent Worker's Start Date)
- SUPPLIER_NAME
- SUPPLIER_REFERENCE
- FF1 - FF5

Creating Additional Tokens

If your messages require additional tokens, you can create a formula that returns up to five outputs that you can use as tokens (FF1 - FF5) in your message text. You create the formula using Oracle FastFormula.

See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*.

People Management Configurator Options

This section describes the configuration options you can use when designing your template. The options are shown in the order that they appear on the People Management Configurator tool.

Template Properties

Template Code

Displays the internal name for the template. This code in combination with the Legislation uniquely identifies the template. You use this name when adding the window to the user's menu.

Template Name

Specifies the descriptive name of the template.

Enabled

A template can be enabled or disabled. You can only choose the Run Template option from the Tools menu for a template that is enabled and linked to a menu. Disable a template when it is no longer in use.

Legislation

Specifies the legislation of the template. Leave the legislation option blank to create a generic template. The system automatically displays the appropriate legislative version of a template for a user, or the generic version if there is no legislative version that

matches the legislation of the user's Business Group.

Description

You can provide a longer description of the template.

Help Target

You can add your own help target to display a particular help topic. This overrides the default context-sensitive help call of the *form.window* name.

> **Note:** The target you enter here has the name of the window from which you have called help appended to it to form the complete target. For example, if you have defined a help target called HIREPER for your template and you call help from the Summary window, then the help target generated is HIREPER.SUMMARY_WINDOW.

Online Help Targets for Templates, page 3-173

Further Information

Use this Further Template Properties flexfield to enter additional configuration information for the template. For example, for the People Management templates this flexfield enables you to specify which window is displayed first and which person types are allowed.

[ ]

Additional Template Details descriptive flexfield. You can configure this to include additional information.

Window Properties

Window Name

Specifies the name of the selected window. There are three windows available: Summary, Find, and Maintenance

Title

Specifies the title of the window. This name is displayed at the top left of the window.

Height

Sets the height of the window in inches.

Width

Sets the width of the window in inches.

X Position and Y Position

Sets the position of the window using co-ordinates. X sets the horizontal position and y sets the vertical position. Alternatively, you can use the arrow keys to move the window around.

Further Information

Further Window Properties Developer Descriptive flexfield.

Canvas Properties

Canvas Name

Specifies the name of the selected canvas. This is the region of the window where fields and other items appear The canvases available depend on the window you are creating:

- Background Canvases

  The Maintain, Summary, and Find canvases fill in the background of the window. You cannot amend the properties of these canvases.

- Tab Canvases

  The Maintain Tabs, Summary Tabs, and Find Tabs canvases define the area of the window in which you can define tabs.

- Find Results Canvas

  The Find Results canvas defines the area of the window in which you can define the Find Results region.

Visible

Set this to Yes if you want the canvas to be displayed to the user.

Height

Sets the height of the canvas in inches.

Width

Sets the width of the canvas in inches.

X Position and Y Position

Sets the position of the canvas using co-ordinates. X sets the horizontal position and y sets the vertical position. Alternatively, you can use the arrow keys to move the canvas around.

Further Information

Developer Descriptive flexfield.

Tab Page Properties

Tab Page Name

Displays the name of the tab. The tabs available to you depend on the window you are editing:

- Find - The find window has six tabs you can set up for any use.
- Maintain - The Maintain window has ten tabs available. Three tabs have been set up to be used specifically for Extra Information Types (EIT), Special Information Types (SIT), and the checklist.
- Summary - The Summary window has ten tabs available. One tab has been set up to be used specifically for the checklist.

Visible

Set this to Yes if you want the tab to be displayed to the user.

Label

The label appears on the tab and describes the content of the tab.

You can define an access key (or keyboard shortcut) by preceding the appropriate letter in the label with an ampersand (&). For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Personal Details tab, enter the label &Personal Details.

Do not use the letters A, E, F, G, H, Q, S, or W, as they are used on the Oracle Applications menu. There is no validation to prevent the same letter being used more than once in the same window.

Navigation Direction

Sets the tabbing order for the items in the tab. This can be left to right, or top to bottom.

Further Information

Developer Descriptive flexfield.

Item Properties

Item Name

The item name is the name of the data item or field, such as LAST_NAME, you have currently selected in the People Management Configurator Items branch. Items also include buttons, such as the Actions or Notify button, and flexfield popup windows. If you are working with a predefined template, only the fields used in that template are displayed on the People Management Configurator Items branch. You can add other fields to your template from the window.

See: Adding and Removing Fields on a Template, page 3-226.

Window Name

Displays the window name on which the field is used. You cannot change this property. Each field has an associated window. There are three windows available: Summary, Find, and Maintenance

Tab Page Name

Displays the name of the tab or tabs in the window on which the field is positioned. You can choose a tab by clicking the button next to this field to see the available tab pages you can use.

Visible

Set this to Yes if you want the field to be displayed to the user. If it is set to No, the user cannot see the field but the field and its value are still in use. For example, the Secure check box on the Find window is not visible but the box has been checked. The user cannot see the check box on the window but the security restriction still applies.

Height

Sets the height of the field in inches.

Width

Sets the width of the field in inches.

X Position and Y Position

Sets the position of the field using co-ordinates. X sets the horizontal position and y sets the vertical position. Alternatively, you can use the arrow keys to move the field

around.

Enabled

Specifies whether the user can put their cursor into this field. If it is set to No, the user can see the field but cannot do anything to it.

Required

Set this to Yes if you want to make the field mandatory.

Query Allowed

Specifies whether the user can run a query in this field.

> **Note:** This property is ignored in the People Management templates. You can only run queries using the Find window.

Insert Allowed

Specifies whether the user can insert new data in this field. If this is set to No for a field or button then it appears greyed out in the window.

> **Note:** If you set this option to No for a check box then the check box still appears in white on the window. To grey out a check box you must set the Enabled option to No.

Update Allowed

Specifies whether the user can enter information in the field and save it to the database. If this is set to No, the user can enter information but cannot save it.

> **Note:** All fields included on a Summary window are greyed out, irrespective of the settings in the Insert Allowed and Update Allowed fields.

Prompt Text

Defines what text is displayed with the field. It also defines the text displayed for a group of check boxes. You enter text labels for individual check boxes using the Label property (see below).

Prompt Display Style

Specifies where a prompt is displayed for multi-row columns. "First Record" displays a prompt next to the first row. "All Records" displays a prompt next to each row.

"Hidden" hides all prompts.

Prompt Text Alignment

Specifies the alignment of the prompt text as Center, Left, Right, End, or Start within the prompt box. Generally has no visible effect.

Prompt Edge

Specifies which edge of the field the prompt is attached to, either Start, End, Top, or Bottom.

Prompt Edge Alignment

Specifies how the prompt is aligned along the selected field edge, either Start, End or Center.

Prompt Edge Offset

Specifies the distance between the field and its prompt, measured in inches.

Prompt Alignment Offset

Use this property to adjust the prompt edge alignment. For example, if the Prompt Edge is Top, the Prompt Edge Alignment is Center and the Prompt Alignment Offset is 0.1, the prompt is centered 0.1 inches from the center of the top edge of the field.

Label

This only applies to buttons or check box items. The label describes the button or individual check box.

You can define an access key (or keyboard shortcut) by preceding the appropriate letter in the label with an ampersand (&). For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Picture window, enter the label &Picture.

Do not use the letters A, E, F, G, H, Q, S, or W, as they are used on the Oracle Applications menu. There is no validation to prevent the same letter being used more than once in the same window.

Tooltip Text

You can enter text here that displays when the user has the mouse pointer over the field. Use this to provide additional quick help.

Previous Item

Specifies which field is tabbed to next if you tab backwards. This overrides the default tabbing order.

Next Item

Specifies which field is tabbed to next. This overrides the default tabbing order.

Default Value

You can set the default value for the field here. Setting defaults can help save time, provide better control, and reduce errors for the user.

Format Mask

You can apply a format style to number and date type fields so that the format is correct for your users.

Validation Formula

You can set up additional validation using formulas. For example, if you need to validate that an entry has been entered correctly, you can create a validation formula to check the format. Up to five inputs can be passed to the formula but only one message can be returned.

See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*

Validation Formula Parameters 1-5

Enter the parameters you want to pass to the formula specified in the Validation Formula field.

Information Formula

You can set up additional information for fields using a formula. For example, on the Job field, the user can right click and choose More Information to see related information such as supervisor. Up to five inputs can be passed to the formula but only three outputs can be returned.

See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*

Information Prompt

Specifies the prompt displayed on the right mouse menu which the user selects to view the information you have defined in the Information Formula.

Information Formula Parameters (1-5)

Enter the parameters you want to pass to the formula specified in the Information Formula field.

Alignment

Defines the alignment of text within the item (left, center, or right).

Case Restriction

Defines what case the text is defaulted to. For example, you can set it to upper case so that all the text entered in the field is upper case.

Bevel

Specifies the appearance of the field border, either RAISED, LOWERED, INSET, OUTSET, or NONE.

Further Information

Opens the Further Item Properties developer descriptive flexfield, where you can enter additional configuration options. For example, for the People Management templates, you can select whether DateTrack History is enabled for datetracked fields.

Fields on the People Management Window

The following table lists all the available fields on the People Management window. Not all of these fields are available on the predefined People Management templates. You can choose which of these fields are displayed on your users' windows by making your own copies of the People Management templates and adding or removing fields.

See Adding and Removing Fields on a Template, page 3-226

Item Title	Windows	Additional Information
Accounting KeyFlex Popup	Maintain	Popup window containing all segments for the Default Expense Account key flexfield

Item Title	Windows	Additional Information
Action	Maintain Summary	Button. If you are updating a worker record that is outside your current business group, then you can perform all actions on that worker record, except the following: • Offer to Applicant • Hire Applicant • Hire Single Applicant Assignment • New Application • New Assignment • Hire Into Job • Convert to CWK • Enter New Assignment Details
Address Attribute 1-20	Maintain Summary	Segments from the Additional Address Details descriptive flexfield
Address Attribute Category	Maintain Summary	Context for the Additional Address Details descriptive flexfield
Address Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Address Details descriptive flexfield
Address Date From	Maintain Summary	Field
Address Date To	Maintain Summary	Field

Item Title	Windows	Additional Information
Address Information 13-20	Maintain Summary	Segments from the Address developer flexfields that may have been defined by localization teams
Address Information Popup	Maintain Summary	Popup window containing all segments for the Address developer flexfields
Address Line 1-3	Maintain Summary	Field
Address Type	Maintain Summary	Field
Adjusted Service Date	Maintain Summary	Field
Age	Maintain Summary	Field
Agreed Working Hours	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Alternate First Name	Maintain	Filed avaiable in the Employment Details tabbed region. This field is available to Kuwaiti users only.
Alternate Family Name	Maintain	Field Available in the Additional Name Details tabbed region. This field is available to Kuwaiti users only.
Annuities	Maintain	Field Available in the GOSI Details tabbed region. This field is available to Saudi users only

Item Title	Windows	Additional Information
Annuities Join Date	Maintain	Field Available in the GOSI Details tabbed region. This field is available to Saudi users only
Applicant Number	Find Results Find Maintain Summary	Field
Application Attribute 1-20	Maintain Summary	Segments from the Additional Application Details descriptive flexfield
Application Attribute Category	Maintain Summary	Context for the Additional Application Details descriptive flexfield
Application Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Application Details descriptive flexfield
Application Date End	Summary	Field
Application Date Received	Maintain Summary	Field
Approved	Maintain Summary	Field
Assignment Attribute 1-30	Maintain Summary	Segments from the Additional Assignment Details descriptive flexfield
Assignment Attribute Category	Maintain Summary	Context for the Additional Assignment Details descriptive flexfield
Assignment Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Assignment Details descriptive flexfield

Item Title	Windows	Additional Information
Assignment Category	Find Results Find Maintain Summary	Employment or Assignment Category
Assignment Effective End Date	Find Results Maintain Summary	Field
Assignment Effective Start Date	Find Results Maintain Summary	Field
Assignment Extra Information 1-30	Maintain	Assignment extra information types
Assignment Extra Information Category	Maintain	Context for the Assignment extra information types
Assignment List	Maintain	Drop-down list displaying person's assignments
Assignment Number	Find Results Maintain Summary	Field
Assignment Rate	Maintain	Assignment rate for contingent workers
Assignment Rate Basis	Maintain	Assignment rate basis for contingent workers
Assignment Rate Currency	Maintain	Assignment rate currency for contingent workers
Assignment Rate Value	Maintain	Assignment rate monetary value for contingent workers

Item Title	Windows	Additional Information
Assignment Sequence	Find Results Maintain Summary	Field
Assignment Status Type	Find Results Find Maintain Summary	Field
Assignment Title	Summary	Field
Assignment Type	Find Results Maintain Summary	Field
Available For Transfer	Maintain Summary	Field
Background Check Date	Maintain	Field
Background Check Status	Find Results Maintain Summary	Field
Background Date Check	Find Results Summary	Field
Bargaining Unit Code	Find Results Find Maintain Summary	Field

Item Title	Windows	Additional Information
Benefit Group	Find Results Find Maintain Summary	Field
Benefit Medical Plan Number	Maintain	Field
Birth Name	Maintain	Field. Hungarian users only
Billing Title	Maintain	Field
Blood Type	Find Results Maintain Summary	Field
Business Group	Find Summary Maintain	Field. If you want to use the Business Group field to query and update worker information across business groups, you must associate a global security profile to your responsibility. If you do not use a global security profile, you can view the business group of the worker you searched for, but you cannot use the Business Group field to search for workers.
Button 1-5	Maintain	Task flow buttons
Cancel	Find	Button
Change Date	Maintain Summary	Assignment change date
Change Reason	Find Results Maintain Summary	Assignment change reason

Item Title	Windows	Additional Information
Checklist 1-10 Date Done	Maintain Summary	Field
Checklist 1-10 Date Due	Maintain Summary	Field
Checklist 1-10 Item Code	Maintain Summary	Field
Checklist 1-10 Notes	Maintain Summary	Field
Checklist 1-10 Status	Maintain Summary	Field
Citizen Identification Number	Maintain	Field. Chinese Users only.
Civil Identity Number	Maintain	Field This field is available to Saudi users only
Civil Identifier	Maintain	Field Available in the Employee Details tabbed region. This field is available to Kuwaiti users only.
Civil Status	Find Results Maintain	Field. Finnish users only.
Clear	Find	Button
Collective Agreement	Maintain Summary	Field
Collectively Agreed Grades Id Flex Num	Maintain Summary	Field

Item Title	Windows	Additional Information
Collectively Agreed Grades Name	Maintain Summary	Field
Command Color	Maintain	Field. This is available on the Military tab. Hungarian users only
Command Type	Maintain	Field. This is available on the Military tab. Hungarian users only
Command Number	Maintain	Field. This is available on the Military tab. Hungarian users only
Community Price Category	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.
Condition of Employment	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian and Danish users only.
Contingent Worker Number	Find Results Find Maintain Summary	Field
Contribution Group	Maintain	Field. Spanish users only.
Contract	Find Results Maintain Summary	Field
Coordinated Benefits Medical Plan Number	Find Results Summary	Field
Coordinated Benefits No Coverage	Find Results Summary	Field

Item Title	Windows	Additional Information
Correspondence Language	Find Results Maintain Summary	Field
Country	Maintain Summary	Field
Country 1-3	Maintain Summary	Field
Country of Birth	Maintain Summary	Field
CPR Number	Find Results Maintain	Field. Danish users only.
Currency Code	Maintain Summary	Field
Current Employer	Maintain Summary	Field
Current Record Indicator	Find Results Maintain	This indicator must be included in any multi-block records. It shows the currently selected record. There are separate versions of this item on the Maintain window for special information types and extra information types.
Custom Date Text Item 1-10	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details.

Item Title	Windows	Additional Information
Custom Number Item 1-10	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom Character Text Item 1-10	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom Checkbox Item 1-3	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom List Item 1-3	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom Item with List of Values 1-5	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Date Employee Data Verified	Find Results Maintain Summary	Field
Date From	Maintain	Special information
Date Notice Received	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.

Item Title	Windows	Additional Information
Date Of Birth	Find Results Find Maintain Summary	Field
Date Of Death	Find Results Maintain Summary	Field
Date Of Receipt Of Death Certificate	Maintain	Field
Date Probation End	Find Results Maintain Summary	Field
Date To	Maintain	Special information
Datetrack Correction	Maintain	Datetrack radio button
Datetrack Update	Maintain	Datetrack radio button
Default Code Combination Identifier	Find Results	Internal identifier for the assignment's default expense account
Dependant Adoption Date	Find Results Maintain Summary	Field
Dependant Voluntary Service	Find Results Maintain Summary	Field
Deployment Factor Attribute 1-20	MaintainSummary	Segments from the Additional Deployment Factor Details descriptive flexfield (Work Choices)

Item Title	Windows	Additional Information
Deployment Factor Attribute Category	Maintain Summary	Context for the Additional Deployment Factor Details descriptive flexfield (Work Choices)
Deployment Factors Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Deployment Factor Details descriptive flexfield (Work Choices)
Description of Expense Account	Maintain	Description associated with Accounting KeyFlex popup window
Dpf Fte Capacity	Maintain Summary	Deployment factor FTE capacity
Dpf Work Duration	Maintain Summary	Deployment factor work duration
Dpf Work Hours	Maintain Summary	Deployment factor work hours
Dpf Work Schedule	Maintain Summary	Deployment factor work schedule
Duplicate Check	Maintain Maintain Tabs	Button. This can be placed on the main window or the tabs in the Maintain window. If you include this button you must ensure that you have set up a Find window in your template.
E-Post Address	Find Results Maintain	Field. This is available on the Further Details tab. Finnish users only.
Earliest Available Date	Maintain Summary	Field
Education Establishment 1-4 Attended End Date	Summary	Schools information

Item Title	Windows	Additional Information
Education Establishment 1-4 Attended Start Date	Summary	Schools information
Education Establishment 1-4 Full Time	Summary	Schools information
Education Establishment 1-4 Name	Summary	Schools information
Effective Date	Find Maintain	There are separate versions of this element for the Find window and the timeline on the Maintain window
Email Address	Find Results Find Maintain Summary	Field
Employee Category	Maintain Summary	Field
Employee Group	Find Results Maintain	Field. This is available on the Employment Information tab. Danish users only.
Employer	Maintain	Field Available in the GOSI tabbed region This field is available to Saudi users only
Employee Number	Find Results Find Maintain Summary	Field
Employee Status	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.

Item Title	Windows	Additional Information
Employment Type	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.
Establishment	Find Maintain Summary	Field
Expatriate	Maintain	Field. Chinese Users only.
Expense Check Send Address	Find Results Maintain Summary	Field
Extra Information Type List	Maintain	Displays a drop-down list of extra information types.
Family Name	Maintain	Field Available in the Alternate Names and in the Employee Details tabbed region This field is available to Saudi and Kuwaiti users only
Family/Last	Maintain	Field. Chinese users only.
Father Name	Maintain	Field Available in the Alternate Names and in the Employee Details tabbed region This field is available to Saudi and Kuwaiti users only
Father's Alternate Name	Maintain	Field Available in the Additional Name Details tabbed region. This field is available to Kuwaiti users only.
Field	Find Results Maintain	Field. This is available on the Further Details tab. Finnish users only.

Item Title	Windows	Additional Information
Field 1-5 Condition Code	Find	Advanced search items
Field 1-5 Name	Find	Advanced search items
Field 1-5 Value	Find	Advanced search items
Find	Find	Button
First Name	Find Results Find Maintain Summary	Field
Frequency	Find Results Maintain Summary	Dependent field. Used with Normal Hours.
Full Name	Find Results Find Maintain Summary	Field
Full Name Title	Summary	Field
Full / Part Time	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Full Time Equivalent Capacity	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Gender	Find Results Find Maintain Summary	Field
Given/First	Maintain	Field. Chinese Users only.
Go	Maintain	Button used on timeline to show details as of the effective date entered
GOSI Number	Maintain	Field Available in the GOSI Details region tabbed region This field is available to Saudi users only
Grade Ladder	Find Results Find Maintain Summary	Field
Grade	Find Results Find Maintain Summary	Field
Grade Point Average	Find Results Maintain	Field. This is available on the Further Details tab. Norwegian users only.
Grandfather Name	Maintain	Field Available in the Alternate Names and Employee Details tabbed region This field is available to Saudi and Kuwaiti users only

Item Title	Windows	Additional Information
Grandfather's Alternate Name	Maintain	Field Available in the Additional Name Details tabbed region. This field is available to Kuwaiti users only.
Governorate	Maintain	Field Available in the Employee Details tabbed region. This field is available to Kuwaiti users only.
Group	Maintain	Field. This is available on the Civil tab. Hungarian users only.
Hazards	Maintain	Field Available in the GOSI Details tabbed region. Available in the GOSI Details tabbed region This field is available to Saudi users only
Hazards Join Date	Maintain	Field Available in the GOSI Details tabbed region This field is available to Saudi users only
Hire Date	Maintain Summary	Start Date for Employee
Hukou Location	Maintain	Field. Chinese Users only.
Hukou Type	Maintain	Field. Chinese Users only.
Hold Applicant Date Until	Find Results Maintain Summary	Field
Honors	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Hourly Salaried	Find Results Maintain Summary	Field
Identifier Type	Maintain	Field. Spanish users only.
Identifier Value	Maintain	Field. Spanish users only.
Insurance Occupational Group	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.
Internal Address Line	Find Results Maintain Summary	Field
Internal Location	Find Results Maintain Summary	Field
Job	Find Results Find Maintain Summary	Field
Job Status	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Jubilee Status	Find Results Maintain	Field. This is available on the Further Information tab. Danish users only.
Known As	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Labour Union Member	Find Results Maintain Summary	Field
Last Medical Test By	Find Results Maintain Summary	Field
Last Medical Test Date	Find Results Maintain Summary	Field
Last Name	Find Results Find Maintain Summary	Field
1st Last Name	Maintain	Field. Spanish users only.
2nd Last Name	Maintain	Field. Spanish users only.
Level	Find Results Maintain	Field. This is available on the Further Details tab. Finnish users only.
Load Picture	Maintain	Button that enables you to load a digitized picture of the person
Local Department	Maintain	Field. This is available on the Civil tab. Hungarian users only.
Local Sub Department	Maintain	Field. This is available on the Civil tab. Hungarian users only.
Local Unit	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian and Finnish users only.

Item Title	Windows	Additional Information
Location	Find Results Find Maintain Summary	Field
Legal Employer	Maintain	Fields Available in the Employment Details tabbed region. This field is available to Kuwaiti users only.
Legal Entity	Find Results Maintain	Field. This is available on the Employment Information tab. Danish users only.
Mailstop	Find Results Maintain Summary	Field
Manager	Find Results Maintain Summary	Field
Mandate Code	Maintain	Field. This is available on the Military tab. Hungarian users only.
Mandate Date	Maintain	Field. This is available on the Military tab. Hungarian users only.
Marital Status	Find Results Maintain Summary	Field
Middle Names	Find Results Find Maintain Summary	Field

Item Title	Windows	Additional Information
Mother's Maiden Name	Maintain	Field. Hungarian users only
Multiple Components	Maintain	Field
National Identifier	Find Results Find Maintain Summary	Field
NI Number	Find Results Maintain	Field. Norwegian users only.
NIF Number	Maintain	Field. Spanish users only
Nationality	Find Results Find Maintain Summary	Field
No Benefit Coverage	Maintain	Field
Normal Hours	Find Results Maintain Summary	Field
Notice Period Length	Maintain Summary	Field
Notice Period Units	Maintain Summary	Dependent field. Used with Notice Period Length.
Notify	Maintain Summary	Field

Item Title	Windows	Additional Information
Number of Credits	Find Results Maintain	Field. This is available on the Further Details tab. Norwegian users only.
NUS-2000 Code	Find Results Maintain	Field. This is available on the Further Details tab. Norwegian users only.
Office Number	Find Results Maintain Summary	Field
On Military Service	Find Results Maintain Summary	Field
Only Current Location	Maintain Summary	Field
Organization	Find Results Find Maintain Summary	Field
Organization	Maintain	Field. This is available on the Civil tab. Hungarian users only
Original Date Of Hire	Maintain Summary	Field
Pay Basis	Find Results Maintain Summary	Salary frequency
Pay Proposal Attribute 1-20	Maintain Summary	Segments from the Additional Salary Administration Details descriptive flexfield

Item Title	Windows	Additional Information
Pay Proposal Attribute Category	Maintain Summary	Context for the Additional Salary Administration Details descriptive flexfield
Pay Proposal Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Salary Administration Details descriptive flexfield
Payroll	Find Results Find Maintain Summary	Field
Payroll Period	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Pension Provider	Find Results Maintain	Field. This is available on the Employment Information tab. Danish users only.
People Group	Find	Field
People Group KeyFlex Popup	Find Results Maintain Summary	Popup window containing all segments for the People Group key flexfield
People Group Segment 1-30	Find Results Maintain Summary	Segments from the People Group key flexfield
Performance Review Period	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Performance Review Period Frequency	Find Results Maintain Summary	Dependent field. Used with Performance Review Period.
Person Attribute 1-30	Maintain Summary	Segments from the Additional Person Details descriptive flexfield
Person Attribute Category	Maintain Summary	Context for the Additional Person Details descriptive flexfield
Person Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Person Details descriptive flexfield
Person Effective End Date	Find Results Maintain Summary	Field
Person Effective Start Date	Find Results Maintain Summary	Field
Person Extra Information 1-30	Maintain	Person extra information type
Person Extra Information Category	Maintain	Context for the Person extra information type
Person Information 1-30	Find Results Maintain Summary	Person developer descriptive flexfield. This will only contain records if they have been set up for your legislation.
Person Information Category	Find Results Maintain Summary	Context for the Person developer descriptive flexfield.

Item Title	Windows	Additional Information
Person Information Popup	Find Results Maintain Summary	Popup window containing all segments for the Person developer descriptive flexfield.
Person Referred By	Find Results Maintain Summary	Field
Person Type	Find Results Find Maintain Summary	Field
Personal ID	Find Results Maintain	Field. Finnish users only.
Personal Identity Number	Maintain	Field. This is available on the Employment tab. Hungarian users only
Personnel Group	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.
Pensioner Registration Number	Maintain	Field. This is available on the Employment tab. Hungarian users only
Phone Home Date From	Maintain Summary	Field
Phone Home Date To	Maintain Summary	Field
Phone Home Fax Date From	Maintain Summary	Field

Item Title	Windows	Additional Information
Phone Home Fax Date To	Maintain Summary	Field
Phone Home Fax Number	Maintain Summary	Field
Phone Home Number	Maintain Summary	Field
Phone Mobile Date From	Maintain Summary	Field
Phone Mobile Date To	Maintain Summary	Field
Phone Mobile Number	Maintain Summary	Field
Phone Work Date From	Maintain Summary	Field
Phone Work Date To	Maintain Summary	Field
Phone Work Fax Date From	Maintain Summary	Field
Phone Work Fax Date To	Maintain Summary	Field
Phone Work Fax Number	Maintain Summary	Field
Phone Work Number	Maintain Summary	Field

Item Title	Windows	Additional Information
Picture	Maintain Summary	Field
Placement Start Date	Maintain Summary	Start date for a contingent worker period of placement
Place of Birth	Maintain	Field. Hungarian users only.
Place of Residence	Find Results Maintain	Field. This is available on the Further Details tab. Finnish users only.
Position	Find Results Find Maintain Summary	Field
Position	Maintain	Field. This is available on the Civil tab. Hungarian users only
Postal Code	Maintain Summary	Field
Pre Name Adjunct	Find Results Maintain Summary	Field
Previous Last Name	Find Results Maintain Summary	Field
Primary Address	Maintain	Field

Item Title	Windows	Additional Information
Primary Assignment	Find Results Maintain Summary	This check box should always be set to display only when included in a template. When a user wants to change a secondary assignment to a primary they must use the Make Primary Assignment action.
Probation Period	Find Results Maintain Summary	Field
Probation Unit	Find Results Maintain Summary	Dependent field. Used with Probation Period.
Professional Category	Maintain	Field. Spanish users only.
Projected Hire Date	Find Results Find Maintain Summary	Field
Projected Placement End Date	Maintain Summary	Projected end date for a contingent worker period of placement
Project Title	Find Results Find Maintain Summary	Field
Proposed Salary	Maintain Summary	Field
Qualification	Find Results Maintain	Field. This is available on the Further Details tab. Norwegian and Finnish users only.

Item Title	Windows	Additional Information
Rank	Maintain	Field. This is available on the Military tab. Hungarian users only
Reason Not Completed	Maintain	Field. This is available on the Military tab. Hungarian users only
Receipt Of Death Certificate Date	Find Results Summary	Field
Recruiter	Find Results Maintain Summary	Field
Recruitment Activity	Find Results Find Maintain Summary	Field
Region 1-3	Maintain Summary	Address regions
Regional Membership	Find Results Maintain	Field. This is available on the Further Details tab. Finnish users only.
Region of Birth	Maintain Summary	Field
Registered Disabled	Find Results Find Maintain Summary	Field
Rehire Reason	Maintain Summary	Field

Item Title	Windows	Additional Information
Rehire Recommendation	Find Results Maintain Summary	Field
Religion	Maintain	Field This field is available to Saudi users only
Relocate Domestically	Maintain Summary	Field
Relocate Internationally	Maintain Summary	Field
Relocation Preference	Maintain Summary	Field
Reported Assignment	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.
Requisition	Find Results Find Maintain Summary	Field
Resume Exists	Find Results Maintain Summary	Field
Resume Last Updated	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Retirement Age	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian and Finnish users only.
Retirement Date	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian and Finnish users only.
Retirement Inquiry Sent	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Salary Basis	Find Results Find Maintain Summary	Field
Salary Change Reason	Maintain Summary	Field
Salary Review Period	Find Results Maintain Summary	Field
Salary Review Period Frequency	Find Results Maintain Summary	Dependent field. Used with Salary Review Period.
Save As	Find	Button
Second Passport Exists	Find Results Maintain Summary	Field
Secondary E-mail	Find Results Maintain	Field. This is available on the Further Details tab. Finnish users only.

Item Title	Windows	Additional Information
Secure	Find	Check box
Ledger	Maintain	Field
Section	Maintain	Field. This is available on the Employment tab. Spanish users only.
Show Details	Find Summary	Button
Social Insurance/PHF Contribution Area	Maintain	Field. Chinese Users only.
Soft Coded KeyFlex Popup	Find Results Maintain Summary	Popup window containing all segments for the soft coded legislation key flexfield.
Soft Coded Segment 1-30	Find Results Maintain Summary	The soft coded legislation key flexfield holds legislation specific information at the assignment level. The legislation of your Business Group determines which flexfield structure you see.
Social Security Code	Maintain	Field
Social Security Office	Find Results Maintain	Field. This is available on the Further Details tab. Norwegian users only.
Source Organization	Find Results Maintain Summary	Field
Social Security Start Date	Maintain	Field. Hungarian users only
Social Security End Date	Maintain	Field. Hungarian users only
Service Completed	Maintain	Field. This is available on the Military tab. Hungarian users only

Item Title	Windows	Additional Information
Service Start Date	Maintain	Field. This is available on the Military tab. Hungarian users only
Service End Date	Maintain	Field. This is available on the Military tab. Hungarian users only
Shift Work	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Shift Work Type	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.
Shift Work Type Days	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.
Source Type	Find Results Maintain Summary	Field
Social Security Number	Maintain	Fields available in the Employment Details tabbed region. This field is available to Kuwaiti users only.
Special Ceiling Point	Find Results Maintain Summary	Dependent field. Used with Special Ceiling Step.
Special Ceiling Step	Find Results Maintain Summary	Field
Special Information Segment 1-30	Maintain	Field
Special Information Type List	Maintain	Displays a drop-down list of special information types.

Item Title	Windows	Additional Information
Special Title	Maintain	Field
Speed Dial Number	Find Results Maintain	Field. This is available on the Further Details tab. Finnish users only.
SSB Position Code	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Start Date	Find Results Find Maintain Summary	Field
Student Status	Find Results Maintain Summary	Field
Style	Maintain Summary	Address style
Sub Group		
Successful	Maintain Summary	Flag indicating whether an application was successful
Suffix	Find Results Maintain Summary	Field
Supervisor	Find Results Find Maintain Summary	Field

Item Title	Windows	Additional Information
Supplier ID For Assignment	Find Results Find Maintain Summary	Supplier ID information for a contingent worker
Supplier ID For Worker	Find Results Find Maintain Summary	Supplier ID information for a contingent worker
Supplier Name	Find Results Find Maintain Summary	Supplier name for contingent worker
System Person Type	Find Results Maintain	Field
System Status	Find Results Summary	Field
Tax Area	Maintain	Field. Chinese Users only.
Tax Effective End Date	Maintain Summary	Field
Tax Effective Start Date	Maintain Summary	Field
Tax Field 1-150	Maintain Summary	Empty items to enable localization teams to configure legislation specific information, such as tax information.
Tax Identification Number	Maintain	Field. This is available on the Employment tab. Hungarian users only

Item Title	Windows	Additional Information
Telephone Number 1-3	Maintain Summary	Field
Termination Reason	Maintain Summary	Field
Time Normal Finish	Find Results Maintain Summary	Field
Time Normal Start	Find Results Maintain Summary	Field
Timeline Field	Maintain	Drop-down list that enables you to select what data is shown in the timeline
Timeline First	Maintain	Button
Timeline Last	Maintain	Button
Timeline Next	Maintain	Button
Timeline Previous	Maintain	Button
Title	Find Results Find Maintain Summary	Field
Town of Birth	Maintain Summary	Field
Town Or City	Maintain Summary	Field

Item Title	Windows	Additional Information
Travel Required	Maintain Summary	Field
Unacceptable Country 1-3	Maintain Summary	Countries in which the person does not want to work
Under 18 Approved	Maintain	Field. Spanish users only
Union Membership	Find Results Maintain	Field. This is available on the Employment Information tab. Danish users only.
Union Occupational Group		Field. This is available on the Employment Information tab. Finnish users only.
Uses Tobacco	Find Results Maintain Summary	Field
Vacancy	Find Results Find Maintain Summary	Field
Visit Internationally	Maintain Summary	Field
Work Center	Maintain	Field. Spanish users only
Work Any Country	Maintain Summary	Field
Work Any Location	Maintain Summary	Field

Item Title	Windows	Additional Information
Work Schedule	Find Results Maintain Summary	Field
Work Title	Find Results Maintain	Field. This is available on the Employment Information tab. Norwegian users only.
Working Time Type	Find Results Maintain	Field. This is available on the Employment Information tab. Finnish users only.

Using the People Management Configurator

Use the People Management Configurator to create your own versions of the predefined People Management templates and design windows that match your business processes.

> **Note:** You can also use CustomForm to configure certain windows, including the People Management template windows, by setting access restrictions.
>
> See: Using CustomForm, page 3-241

To configure a template using the People Management Configurator:

1. Write any formulas you require for the template. You can write formulas to:
   - Change the name used to identify assignments.
   - Validate user entries in a field.
   - Provide more information on a field, which the user can access from the right mouse menu when they right-click on the field.
   - Create additional tokens for notification messages.

     See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*.

2. Open and make a copy of a predefined template using the People Management Configurator, or import an existing template.

See: Opening and Copying a Template, page 3-223

See: Importing a Template, page 3-234

3. Modify the template to your requirements. You can perform as many of the following tasks as you require to complete your template.

   See: Editing a Template, page 3-224

   See: Adding and Removing Fields on a Template, page 3-226

   See Adding Flexfields to a Template, page 3-227

   See: Defining Checklists, page 3-228

   See: Setting Defaults for Fields in Templates, page 3-230

   See: Setting Up Context-Sensitive Fields in Templates, page 3-231

   See: Setting Up DateTrack History on Fields in Templates, page 3-232

   See: Setting Up More Information on Fields in Templates, page 3-232

4. Review the predefined notifications and create any required new ones using Oracle Workflow.

   See: Notification Messages Issued from Template Forms, page 3-173

5. If appropriate, use CustomForm to restrict the information that appears in the template window, and the actions that users can perform.

   See: Configure a Window With CustomForm, page 3-241

6. Create a form function for the new window, and add the window to a menu or task flow.

   See: Adding a People Management Window to a Menu or Task Flow, page 3-233

7. Preview the form in the People Management Configurator to check properties such as field tabbing sequence and defaults. You can also check whether you are happy with the default position of task flow buttons. If not, you can reposition them in the People Management Configurator.

Opening and Copying a Template

You can use the predefined People Management templates as a basis for designing your own windows. You cannot edit the predefined templates directly, but you can make your own copy of any template and edit the copy. You can then always return to the original template if necessary.

> **Note:** We also recommend that you set up templates in a test area. This avoids any security infringements when you run a template to view the

windows you are designing. If the Security check box on the Find window is not selected, you can view summary information in the search results about all the people who meet your search criteria. This may include people outside your security profile.

To open and copy a template:

1. In the Navigator, open the People Management Configurator.
2. In the Find Templates window, select the template you want to copy.
3. Choose the Copy button.
4. In the Copy Template window, enter the details for your new template in the Copy To section:
   - Enter a template code and, optionally, a legislation. These must form a unique combination, but you can create several legislative variations using one template code.

     You use the template code when you add the template window to a menu.
   - Enter a descriptive name for the template
   - Choose Yes or No to enable or disable the template. While designing a window, you can choose No so that users cannot display the window.
5. Choose OK. In the Decision window that appears next, choose Yes.

   The Designer (People Management) window is displayed along with a representation of how the template window will appear to the user.

   To make changes to the template, see Editing a Template, page 3-224.

Editing a Template

You can edit a copy of a predefined template to design the layout and content of a People Management window. Use the People Management Configurator tool.

> **Note:** You cannot edit the predefined templates directly. To make a copy of a predefined template to edit, see Opening and Copying a Template, page 3-223

To see a full list of the properties you can set for templates, windows, canvases, tab pages, and items, see: People Management Configurator Options, page 3-176.

To edit a template:

1. In the Find Template window, select the template you want to edit and choose Edit.

   The Designer window of the People Management Configurator tool is displayed, showing a navigation tree for the items on the template. When you select something in the navigator, its properties are shown in the bottom half of the window. A representation of each window in the template form as it will appear to the user is also displayed behind the Designer.

2. Review the template properties and edit as required. Click in the Further Information field (a predefined descriptive flexfield) if you want to:

   - Restrict the template to handling applicants, employees or contingent workers only.

   - Specify which windows (Summary, Maintenance and Find) are included in the template, and which one displays first.

3. Click the + symbol next to the template name (top node in the navigator) to expand the node and display Windows and Items.

4. Expand **Windows** to display details of the windows in the template.

5. Expand each window to display the canvases and tab pages it contains, then expand the canvases and tab pages to specify the properties of each.

   For example, you can specify the title, size, and position of the Summary window. You can choose which tab pages appear on the Maintenance window and specify the label and navigational direction (top to bottom or left to right) in the tabs.

   > **Note:** If you make any changes to the properties of a window, canvas, tab, or item and do not want to save them, you can select Clear Record from the toolbar to reset the changes.

6. To set up a checklist tab, see Defining Checklists, page 3-228.

7. Expand **Items** to display all the fields and buttons that are used in the template. The window on which each item is displayed is shown in brackets.

8. Select an item to view and update its properties. For example, you can move a field or change its prompt.

9. To add fields that do not currently appear on the template, or remove fields from the template, see: Adding and Removing Fields on a Template, page 3-226.

10. Save your work.

Previewing Your New Window

11. Choose Run Template from the Tools menu to see how the window will appear to your users, and to test task flow and right mouse menus.

    Important: Before you can preview your window, you must first enable the template and add the new window to a menu. We recommend that you preview your windows on a test database only, to avoid security infringements.

Adding and Removing Fields on a Template

For windows that have been designed using the People Management templates, you can choose to remove fields from the window if your users do not need them and you can add new fields if required.

For a full list of the fields, buttons and other items you can add to a template, see: Fields on the People Management Window, page 3-184.

Note: There is a distinction between removing a field from the template and removing a field from a window. If the field is on the template but hidden in the window, the field data is still active. Hidden fields, however, slow your performance so you should remove fields wherever possible. This procedure describes removing a field from the template so that its data is not used.

To add or remove a field from a template:

1. Open the template using the People Management Configurator tool.

   See: Editing a Template, page 3-224.

   The template windows are displayed along with the People Management Configurator tool.

Adding a Field

2. To add a field or other item that is not already in the template, expand the Items node, then right-click on Items and choose New from the right mouse menu.

   Tip: Add all your new fields in a consistent location, such as the top of the branch, to help you keep track of them. Choose Refresh from the right mouse menu when you want the system to place your new fields in their correct alphabetical position.

3. Click on the list of values icon in the Item Name field to open the Item Names Find window. Search for the field you want to add or enter % to see the complete list.

4. Select the field you want to add and choose OK.

   Your new field appears under Items in the navigator.

5. Set the following properties:

   - Tab Page Name
   - Visible
   - Height and width of the field
   - Position - Either use the arrow buttons to move the field around or enter a new position in the X and Y Position fields. As you move a field, you can view how it will appear on the window by looking at the template window.

     Note: If you make any changes to the properties of an item and do not want to save them, you can select Clear Record from the toolbar to reset the changes.

   You can choose to set other properties for the field. Refer to People Management Configurator Options, page 3-176 for a complete description of all the properties.

   See also Adding Flexfields to a Template, page 3-227

   ### Removing a Field

6. To remove a field or button from a template, right-click on the item in the navigator and choose Delete from the right mouse menu.

7. Save your work.

Adding Flexfields to a Template

You can add individual segments of a flexfield to a template you create using the People Management Configurator, or you can add a popup window containing all the segments in a flexfield. For reasons of performance, it is recommended that you use a popup window if you have a large number of segments that you want to add to the window.

Note: You cannot add both individual flexfield segments and a popup window for the same flexfield structure on the same window.

To add individual flexfield segments to a template:

1. Open your template using the People Management Configurator.

   See: Editing a Template, page 3-224.

2. Expand Items and locate the flexfield segment.

3. Add the *value* item for the flexfield segment.

   See Adding and Removing Items on a Template, page 3-226

4. If the user will be selecting the value for the segment from a value set, enter the *meaning* item so that the longer description is also displayed.

   Note: It is your responsibility to ensure that you enter all flexfield segments required by your configuration. If you omit flexfields that you have defined as mandatory, the user will be unable to save records.

To add a popup flexfield window to a template:

1. Open your template using the People Management Configurator.

   See: Editing a Template, page 3-224.

2. Expand Items and locate the flexfield items.

3. If you have previously added individual segments of the flexfield to the template, you must first remove all of them. Right-click on each segment of the flexfield and choose Delete from the right mouse menu.

   See Adding and Removing Items on a Template, page 3-226

4. Add the *Flexfield Name* Popup item to the window. This adds a popup window containing all of the flexfield segments.

5. Save your work

Defining Checklists

A checklist is a list of user actions related to people management and recruitment, such as "Check References" and "Reimburse Expenses". Against each check item, users can record a status, date due, date achieved, and any notes. The checklists are for user reference only; they do not perform any actions.

Checklists can appear on tabs of template forms: on the Summary window, Maintenance window, or both. These tabs are configurable. You specify which check

items are displayed, and which fields are available for entry. There is a limit of ten check items on a tab.

There is also a Checklist window, which you can include in task flows from other windows, such as the People window. The Checklist window is not configurable. On this window, users can select any checklist item that you have defined.

To define checklist items and statuses:

1. Open the Application Utilities Lookups window.
2. Query the lookup CHECKLIST_ITEM.
3. Enter the code, meaning, and optionally a description for each checklist item you want to define.
4. Save your work.
5. Query the lookup CHECKLIST_STATUS.
6. Enter the code, meaning, and optionally a description for each checklist status you want to define.
7. Save your work.

To define a checklist:

1. Open your template using the People Management Configurator.

   See: Editing a Template, page 3-224.

2. Expand Windows, expand the window on which you want to place the checklist, expand the Tab Pages node, and select the Checklist tab.
3. Enter properties for the Checklist tab, including the tab label.

   For a list of the properties you can change for a tab page, see People Management Configurator Options, page 3-176.

4. Expand Items and find Checklist 1 Item Code (Maintain) or Checklist 1 Item Code (Summary), depending which window is to include the checklist. If this item does not appear in the items list, you need to add it.

   See: Adding and Removing Fields on a Template, page 3-226.

5. Enter properties for this item.

   To provide a default check item in this field, enter the appropriate lookup meaning in the Default Value property. You must enter the meaning exactly as you typed it in the Application Utilities Lookups window. If you want to prevent users from

selecting other check items in this field, set the Insert Allowed property to No.

6. Save your work.

7. To specify the fields that accompany this check item in the checklist, find the following items. If they do not appear under Items, you can add them. If they appear and you do not want them on your checklist, you can remove them.

   - Checklist 1 Status
   - Checklist 1 Date Due
   - Checklist 1 Date Done
   - Checklist 1 Notes

8. Repeat steps 4 to 7 to add up to ten checklist items to your template, using the items Checklist 2 Item Code through Checklist 10 Item Code.

Setting Defaults for Fields in Templates

The templates enable you to default values in many fields.

See Default Values in Template Fields, page 3-166

To set a default for a field:

1. Open the template using the People Management Configurator tool.

   See: Editing a Template, page 3-224.

2. In the People Management Configurator navigator, expand Items and select the field for which you want to set a default.

   See: Fields on the People Management Window, page 3-184 for a full list of all the available fields.

3. In the Properties section, enter a default value for the field in the Default Value field. There is no list of values available, so you must be careful to type the value exactly as it should appear.

   You can also choose not to display the field on the window even though you have set a default value.

4. If you want to hide the field set the Visible Field to No.

5. Save your work.

Setting Up Context-Sensitive Fields In Templates

You can set up fields that are context-sensitive in your templates using the People Management Configurator tool. You can use the following contexts:

- Person type - for example, to hide the Employee Number field when an applicant is selected.
- Descriptive flexfield context - for example, to display address lines in the appropriate sequence for each address style
- Key flexfield structure - for example, to display the appropriate structure of the Personal Analysis Key Flexfield for each Special Information Type.

> **Note:** If a segment is not defined for a particular structure or context in the flexfield definition, it does not appear on the form even if you set it up for that context in the People Management Configurator.

To set up a context-sensitive field:

1. Open your template using the People Management Configurator.

   See: Editing a Template, page 3-224.

2. In the navigator, expand Items and find the field that you want to make context-sensitive.
3. Set the properties for the default field. You may want to hide the default field so that it only appears in the contexts that you define.
4. Expand the field, right click on Contexts, and choose New from the right mouse menu. You set up a 'child' context field for each context in which you want the field displayed.
5. In the Properties section, select a value in the Context Type field: Descriptive Flexfield, Key Flexfield, or QuickHire Person Type.
6. In the window that displays, enter the context in which this field should display and choose OK.

   For a descriptive flexfield, select the Application, Title, and Context. For example, this could be Oracle Human Resources, Personal Address Details, and United Kingdom respectively. For a key flexfield, select the Application, Title, and Structure. For a QuickHire Person Type, select the person type.

7. Choose the tab you want the field displayed on for this context and set any other

properties, such as position or tool tip text.

8. Repeat steps 4 to 7 for each context in which this field should display.

9. Save your work.

Setting Up DateTrack History on Fields in Templates

You can set up DateTrack History for datetracked and dated fields on a template. This has two effects:

- Users can then right-click in the field and choose DateTrack History to see a history of changes that have been made to that field.

- The field appears in the drop down list by the timeline bar. If you select the field in the drop down list, the timeline shows the dates of changes to this field.

To set up DateTrack History on a field:

1. Open your template using the People Management Configurator.

   See: Editing a Template, page 3-224.

2. Expand Items and find the field.

3. Select the flexfield [ ] at the bottom of the Properties section.

4. Enter Yes in the DateTrack History field.

5. Save your work.

Setting Up More Information on Fields in Templates

You can set up more information to be available to users on each of the fields you include in a template using Oracle FastFormula. The user can right-click in a field and choose a prompt that you specify. For example, you might want to enable the display of a supervisor's email address from the Supervisor field. From the Job field, you might show the normal working conditions for the job.

For examples of how you can set up more information see the Supervisor and Position fields in the predefined Hiring Applicants and Maintaining Employees templates.

To set up more information on a field:

1. Open your template using the People Management Configurator.

   See: Editing a Template, page 3-224.

2. Expand Items and select the field for which you want to set up more information.

3. Enter a formula name in the Information Formula field.

   You create the formula using Oracle FastFormula.

   See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*.

4. Enter a label explaining the information available in the Information Prompt field. This prompt is displayed in the right mouse menu when a user right-clicks on the field.

5. Enter up to five inputs for the formula in the Information Formula Parameter Fields.

6. Save your work.

Adding a People Management Template Window to a Menu or Task Flow

When you create your own version of a window using the People Management Configurator, you need to add your new window to a menu or task flow so that users can access it.

To create a function for a window:

1. You must define a function to call the window. When you define the form function, use parameters to specify the template name, and, if necessary, the customization name and task flow name (separate the parameters by spaces). For example:

   Function: PERWSQHM_CUSTOM_MAINTAIN_EMPS

   Parameters: TEMPLATE_NAME="PER_MAINTAIN_EMPS"
   HR_CUSTOMIZATION="MedicalSIT"
   WORKFLOW_NAME="EMP_DEVELOPMENT"

   For a description of the HRMS parameters you can use when you define functions, see: Using Parameters for HRMS Form Functions, page 1-132.

Adding a window to a menu:

2. You can add the function to any menu.

   For more information about adding your configured window to a menu see: Menus Window, *Oracle Applications System Administrator's Guide*

Adding a window to a task flow:

3. You can create a new task flow for the window. People Management windows must always be the first window in the task flow.

   See: Define Task Flows, page 3-149

Note: If you want to use a version of the People Management window that you have restricted using CustomForm in a task flow, you must first define a new task flow node and then define a menu function to call the task flow.

See: Adding a Custom Window to a Menu or Task Flow, page 3-242

Importing a Template

You can import a template from another database provided that it is for the same legislation as your Business Group. For example, you should not import a UK template for a US Business Group.

You might want to import a template from a test database to your production environment. You can also use this procedure to make backups of templates.

This procedure involves downloading the template to a data file then uploading to your target database.

To import a template:

1. Run the Forms Configurator - Download Template process. You do this in the Submit Requests window for a Super HRMS Manager responsibility.
2. In the Parameters window, enter a filename and full directory path for the data file. The template will be saved to this data file. You will use this data file to import the template later.
3. Select the name of the template you want to download and choose OK.
4. Go to the database where you want to upload and use the template.
5. Run the Forms Configurator - Upload Template process.
6. In the Parameters window, enter the name and path of the data file you created when you downloaded the template.

   The template is now available for you to add to a menu or modify using the People Management Configurator.

Restrict Windows Using CustomForm

CustomForm

Many of the standard Oracle HRMS windows are multipurpose. For example, in the People window, you can enter or view details of employees, applicants, contingent workers, contacts, or other person types that you have defined. In the Element Entries window, you can make entries for all the elements you have defined.

You might prefer to have multiple versions of these windows, each version being used for just one purpose. This approach restricts the list of values on certain fields and therefore provides for faster data entry. It also enables you to limit access to certain types of information.

For example, you might create a version of the View Element Entry History for Employee window that does not display the earnings elements representing salary, bonus, and commission. Most users' menus would only give them access to this version of the window. For the small group of people authorized to view salary, bonus, and commission figures, your system administrator can define a menu function to allow access to the standard window.

You can do this using *CustomForm*.

Restricting Access to People Management Templates

When you create a people management template using the People Management Configurator (see People Management Configurator, page 3-160), you can specify whether the template handles employees, applicants, contingent workers or a combination of all three. This is a quick way to restrict your template windows by system person type. If you need to restrict the template windows by user person type, you can use CustomForm to create a restricted version of your template.

> **Important:** Make sure that the criteria you enter in the Form Customization window do not conflict with any restrictions you put on the template using the People Management Configurator. For example, if you restrict the template to Applicants Only in the People Management Configurator then create a version that only handles the user person type Graduate Intake (a type of employee), users will not be able to find any people using the template.

You can also use CustomForm to restrict People Management templates in other ways. You can restrict the special information types, extra information types, actions, and notifications that are available from your templates. You can also control the fields available for searching and the new records (applicant, employee, contingent worker, assignment or application) that users can create using the templates.

Windows you can Restrict using CustomForm

You can use CustomForm to restrict the information available in the windows listed in the table below. We also identify the criteria you can use to restrict access to information.

Window	Restrict By	Values
Adjust Balance: (Oracle Payroll form)	Element Set	User defined
Adjust Balance: (Oracle Payroll form)	Element Processing Type	Recurring, Nonrecurring
Assignment Folder	Person Type	User defined
Element Entries	Element Set	User defined
Element Entries	Element Processing Type	Recurring, Nonrecurring
Element Entries	Entry Type	Override
Event Bookings	Employee or Applicant	Employee, Applicant
Extra Assignment Information	Extra Information Type	User defined
Extra Element Information	Extra Information Type	User defined
Extra Job Information	Extra Information Type	User defined
Extra Location Information	Extra Information Type	User defined
Extra People Information	Extra Information Type	User defined
Extra Position Information	Extra Information Type	User defined
List Employees by Element	Element Set	User defined
List Employees by Element	Element Processing Type	Recurring, Nonrecurring
List People by Special Information	Employee or Applicant	Employee, Applicant

Window	Restrict By	Values
List People by Special Information	Special Information Type	User defined
List People by Special Information	Person Type	User defined
Organization	Organization Classification	List of Organization Classifications
Payroll and Assignment Processes: (Oracle Payroll form)	Action Type	List of Action Types (e.g. Run, Pre-payments, Reversal)
People Folder	Person Type	User defined
People (PERWSEPI), People and Assignment (PERWSHRG): (Enter Personal Information)	Person Action	User defined
People (PERWSEPI), People and Assignment (PERWSHRG): (Enter Personal Information)	Person Function	User defined
People (PERWSEPI), People and Assignment (PERWSHRG): (Enter Personal Information)	Person Type	User defined
People Management	Person Type	User defined
People Management	Special Information Type	User defined, and some may be predefined
People Management	People Extra Information Type	User defined, and some may be predefined
People Management	Assignment Extra Information Type	User defined, and some may be predefined
People Management	Actions	List of available actions such as Hire Applicant

Window	Restrict By	Values
People Management	Workflow Notifications	Notifications defined in workflow; some predefined, you can add others
People Management	New Objects	New Applicant, New Employee, New Application, New Assignment
Position Occupancy Folder	Employee or Applicant	Employee, Applicant
Run QuickPaint Report	QuickPaint Inquiry	User defined
Run QuickPaint Report	Person Type	User defined
Run QuickPaint Report	Assignments	Assignment Sets, Assignments
Special Information	Special Information Type	User defined
Table Values: (Define User Values)	Table Name	User defined
View Element Entry History for Employee	Element Set	User defined
View Element Entry History for Employee	Element Processing Type	Recurring, Nonrecurring

Types of Data Restrictions

You can restrict the information that appears in a window by the following sorts of criteria:

- Element processing type (recurring or nonrecurring)
- Element set (user defined)
- Person type (user defined)
- Special information type (user defined)

- Organization classification
- Employee, applicant, or contingent worker

  Note: If you choose to restrict access to your form by person type, you select the person type and then choose whether to include or exclude this person type.

- QuickPaint report (user defined)
- Extra Information Type (user defined)
- Action for People Management
- Workflow notification (user defined)
- New objects that you can create using the People Management window
- Fields you can search on using Advanced Find in the People Management window. The fields you select are *excluded* from the Advanced Find.

  Important: When you use a standard window, all types of information are available. When you use a configured version, you can only see the types of information that were selected on the Form Customization window. However, there is one exception. When you restrict the People Management window by Advanced Find Item, you can search in the configured version of the window on all Find items *except* the ones you selected on the Form Customization window.

If you want to restrict the data by a user defined information type, you must create it first:

- To restrict by element set, create the set in the Element and Distribution Set window.

  See: Defining an Element or Distribution Set, *Oracle HRMS Compensation and Benefits Management Guide*

- To restrict by QuickPaint Report, create the report in the Define QuickPaint Report window.

  See: Defining QuickPaint Reports, page 4-36

- To restrict by Special Information Type, define your information type as an instance of the Personal Analysis key flexfield.

  See: Setting Up Special Information, *Oracle HRMS Workforce Sourcing, Deployment,*

and Talent Management Guide

- To restrict by person types, define your user person types in the Person Types window.

  See: Defining Person Types, *Oracle HRMS Enterprise and Workforce Management Guide*

- To restrict by Extra Information Type, define your information type as an instance of the appropriate extra information flexfield.

  See: Setting Up Extra Information Types (Excluding Organization EITs), page 3-33

- To restrict by workflow notification, create your notifications using Oracle Workflow.

Using the Include and Exclude Restrictions

With selected restriction types, you can choose to include or exclude specific types. This is currently only possible with the Person Type restriction. In this case, the system checks whether any of the person types assigned to a person match any of the person types included or excluded using the Person Type restriction.

The different scenarios are best illustrated using examples. In each case, the employee has the person types of Employee and Applicant.

Scenario 1

Included Person Type	Excluded Person Type
Employee	

Result: The employee is visible in the form. In this case, all persons with the person type of Employee are visible.

Scenario 2

Included Person Type	Excluded Person Type
	Employee

Result: The employee is not visible in the form. In this case, all persons with the person type of Employee are excluded and all other persons are visible.

Scenario 3

Included Person Type	Excluded Person Type
Employee	Applicant

Result: The employee is not visible in the form. Even though the employee has the Person Type of Employee, which is included according to the restriction, the Excluded Person Type of Applicant takes priority over the Included Person Type and the employee is not visible in the form.

Note: It is not possible to include and exclude the same person type.

Using CustomForm

Use CustomForm to configure a certain set of windows by setting restrictions in them. For example, you can use CustomForm to restrict the elements that users can enter using the Element Entries window.

You can also use the People Management Configurator to modify predefined templates and create windows that match your business processes.

See: Using the People Management Configurator, page 3-222

To configure a window using CustomForm:

1. If you are restricting the information that appears in the configured window by a user defined entity (such as an element set, person type, special information type, or QuickPaint report), ensure that this entity is already defined.

   See: Types of Data Restriction, page 3-238

2. Define a configured version of the window using the Form Customization window.

   See: Configuring a Window With CustomForm, page 3-241

3. Add the new window to a menu or task flow.

   See: Adding a Configured Window to a Menu or Task Flow, page 3-242

Configuring a Window With CustomForm

You can define your own versions of templates and some standard windows in the Form Customization window.

See: List of Configurable Windows, page 3-236

Note: If you want to restrict access to query-only for a window, you do not need to create a separate version. Instead you create a new form function, setting the QUERY_ONLY parameter to YES.

See: Restricting Access to Query-only Mode, page 1-132

To define restrictions for a window:

1. Select the name of the window in the Form to be customized field.
2. Enter the name of your new version in the Name field. This name is used when defining menus but it is not seen by users.
3. Select Enabled if you want the restrictions to come into effect. If you do not select this option, the configured version of the window behaves the same way as the standard version.
4. Enter the titles to appear in the new version of the window:
   - In the Standard Title field, enter the window title to be seen by users who can use the window for data entry and editing.
   - In the Query Title field, enter the window title to be seen by users who have view-only access to the window.

     Note: If you are configuring a template, the titles entered for the template in the People Management Configurator window override those entered here.

5. Save your new version.
6. In the Restrictions block, select the Type and Value of the restrictions you want to define. The types and values available depend on the window you are configuring.

   Note: If you are using the Person Type restriction, you can choose whether to include or exclude the selected person type using the available radio buttons. If you select any other type of restriction, the radio button is automatically set to Include.

Adding a Custom Window to a Menu or Task Flow

When you create a restricted version of a window using CustomForm, you need to add your new window to a menu or task flow so that users can access it.

Adding custom windows:

1. If you want to add the custom window to a task flow, you must create a Task Flow Node for it.

   See: Define Task Flow Nodes, page 3-148

2. If the window is called directly from the Navigator window, you must define a menu function to call the custom version of the window. You can add the function to any menu.

   For a description of the HRMS parameters you can use when you define functions, see: Using Parameters for HRMS Form Functions, page 1-132.

   > **Note:** If you want to use a custom version of the People window, People Folder, or Assignment Folder to start a task flow, you should define a new task flow node and then define a menu function to call the task flow.

   For more information about adding your custom window to a menu see: Menus Window, *Oracle Applications Developers Guide*

Additional Configuration Options

Additional Configuration Options

There are some additional configuration options that your organization may need to set up, depending on the requirements of your system. These include:

- Enabling Currencies, page 3-248
- Setting up Printers, page 3-244
- Setting up International HRMS. See: What is International HRMS?, page 3-245

Setting Up Your Printers

To run reports in Oracle HRMS, you need to associate the following predefined print styles with your printer driver:

- *XX* PS Portrait
- *XX* PS Landscape
- *XX*_Cheque

> **Note:** *XX* represents your country code, such as ZA.

You do this using the Printer Types window.

See: Setting Up Your Printers, *Oracle Applications Systems Administrator's Guide*.

Examples of Printer Driver and Printer Types

Example postscript printer driver (HP LaserJet 4000)

Driver Name:	A4PS
User Driver:	A4 POSTSCRIPT
SRW Driver:	A
Driver Method:	Command

Arguments:	lp -d$PROFILES$.PRINTER -n$PROFILES$.CONC_COPIES -t"$PROFILES$.TITLE" $PROFILES$.FILENAME

Table 1-6 Example of the South African cheque printer driver (HP LaserJet 4000)

Driver Name:	A4CHEQUE
User Driver:	A4 CHEQUE
SRW Driver:	HPA
Driver Method:	Select Command
Arguments:	lp -d$PROFILES$.PRINTER -n$PROFILES$.CONC_COPIES -t"$PROFILES$.TITLE" $PROFILES$.FILENAME
Initialization:	/eE/e(s0P/e&l0O/e&l8D/e&l26A/e&k2S/e(8U/e(s0p12h0s0b4099T/e&l25E
Reset:	/eE/000

Example Printer Type (HP LaserJet 4000)

Style	**Driver Name**
PS Landscape	A4PS
PS Portrait	A4PS
Cheque	A4CHEQUE

What is International HRMS?

International HRMS is a set of standard data categories that provide the foundation for a localized version of HRMS. You can use International HRMS to set up a localized version of HRMS, provided that your localization is not already supported.

You are not obliged to use International HRMS to set up localized data. If you prefer, you can set your own localization by following a series of manual steps. However, the

advantages of using International HRMS to set up a localization are:

- It is faster to install.
- It is easier to install.
- It is easier to support once you have installed it.

International HRMS is also updated regularly. For example, features such as the Costing of Payment process and Cheque/Check Writer (Generic) are included in International HRMS. This means that when you use International HRMS to begin setting up a localization, you already have access to some of the latest features delivered in Oracle HRMS.

How Do You Use International HRMS to Create a Localization?

You apply hrglobal and then run the concurrent program International HRMS Setup. For further details of the exact sequence.

What is Included in International HRMS

International HRMS includes all of the following data definitions:

- Business rules
- Element Classifications
- Bank Key Flexfield and legislative rule for bank key flexfield
- Total payments balance and supported dimension, route, defined balance.

Legislation Rules

This legislation rule is supplied with International HRMS Phase 1:

```
legislation_rule
(p_legislation_code => p_legislation code
,p rule_type => 'E'
,p rule_mode => 'ZZ Bank Details'
```

Element Classifications

These element classifications are supplied with International HRMS Phase 1:

- Information
- Earnings
- Absence

- Supplemental Earnings
- Taxable Benefits
- Pre-tax Deductions
- Tax Deductions
- Direct Payment
- Employer Charges
- Involuntary Deductions
- Voluntary Deductions

Routes

The only route available with International HRMS Phase 1 is Global Payments.

Balance Dimensions

The only balance dimension available with International HRMS Phase 1 is Payments.

Balances

The only balance available with International HRMS Phase 1 is Total Payments.

Overview: Using International HRMS to Define a Localization

You apply International HRMS standard data by following this sequence:

1. Install HRMS
2. Apply patch 2574811 to provide the standard set of data categories needed in every legislation
3. Run hrglobal
4. Apply patch 2574861 to provide a translated set of data for the particular legislation that you are installing
5. Run the concurrent program International HRMS Setup.

See: Running the International HRMS Setup Process, page 3-248

Enabling Currencies

Oracle HRMS enables you to use multiple currencies for entering information about employee compensation and benefits. You can also record your payment methods to employees in different currencies.

For example, if you have employees living and working temporarily in other countries, you might want to record specific earnings or deductions for these employees in local currencies. You might also want to pay these employees a fixed amount into a bank account in their home currency. The remainder you would pay in a local currency.

Your startup data includes the definitions of all world currencies. These definitions are shared by all Oracle Applications and are controlled by the system administrator responsibility. You enable those currencies you want to use in the Currencies window.

> **Note:** You must enable at least one currency as the default currency for all information related to money in your system. This default is known as your Business Group currency.

To enable a currency:

1. Query the currency you want to enable and check the Enabledcheck box. Save your choice to enable the currency.

   You can never delete a currency, but you can disable it.

To disable a currency:

1. Uncheck Enabled, or enter an End Date for the currency.

Running the International HRMS Setup Process

Use the International HRMS Setup process to apply a standard set of data when you are installing a legislation that is not currently supported. You do this after you have:

1. Installed HRMS
2. Applied patch 2574811
3. Run hrglobal
4. Applied patch 2574861

You run the International HRMS Setup process from the Submit Requests window.

To run the International HRMS setup process:

1. Enter your legislation. You can only do this for a legislation that is not currently supported.
2. Enter the currency for your legislation.
3. Enter the Tax Year Start Date.
4. Decide whether you want to use tax units.
5. Choose OK, and then submit your process.

   This creates a legislation with the name, default currency, and tax year details that you specify. When you have completed these setup steps you can then add specific data for your legislation.

Using the Person Name Format Function

The person name format function enables you to specify how a person's name is returned in custom applications or reports etc. You use tokens to specify the format in which you want to see the name. You can call the function in various ways, including PL/SQL, SQL etc.

> **Note:** This function cannot be used to format how names are displayed in windows in the application.

The tokens that you can use are as follows:

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

- $IM - Initial Middle

A series of tokens are passed into the routine and the formatted name is returned.

If the date being passed to the routine is null then the system date is used. Likewise if the format being passed is null then the full_name is returned. If the person_id used is not valid, then an error is raised.

SQL Example 1

You can use a profile to define the name format you required. This ensures that all your reports or customizations to retrieve the name uniformly. If you then decide to change the profile value, the change is reflected everywhere you use the profile value as one of the parameters.

If you create a new profile called XX_NAME and assign the value $FI.$LA to it, you can use the following SQL to retrieve the name of person with the ID 972:

```
SQL> select
hr_person_name.get_person_name(972,null,fnd_profile.value('XX_NAME'))
from dual;
```

This returns the name in the format: Antonio.Bortoliero

SQL Example 2

The following example shows how to use the new function to retrieve the same person's name as of two days before the current system date:

```
SQL> select hr_person_name.get_person_name(972,sysdate-2,'$FI.$MI.$TI')
name from dual;
```

This returns the name in the format: Antonio.D.Doctor

PL/SQL Example

The following shows a simple PLSQL use of the function:

```
declare
   l_name varchar2(2000);
begin
   l_name := hr_person_name.get_person_name
                     (p_person_id        => 972,
                      p_date             => trunc(sysdate),
                      p_format           => '$FI.$LA');
end;
```

In this example l_name would contain the name in the format 'Antonio.Bortoliero'.

4

Workforce Intelligence

Information Access Overview

Oracle HRMS provides a range of inquiry and reporting mechanisms to meet the needs of different users:

- Predefined Discoverer Workbooks that you can use directly, or edit to meet your own reporting requirements.
- Discoverer End User Layer folders that you can use to create your own Discoverer Workbooks.
- Inquiry windows (including folders)
- Predefined reports that can be scheduled and grouped for periodic processing
- QuickPaint, to create your own online inquiries and reports about people and assignments
- Multilingual reporting for some reports
- Use of desktop tools for reporting or editing HRMS data. For example, you can use Application Data Exchange (ADE) to download information to a spreadsheet, and then upload the modified data to HRMS.

Discoverer Workbooks

Oracle Discoverer is a data query and analytical tool that enables you to perform detailed analysis of the human resources issues that interest you. Discoverer uses an End User Layer (EUL), which is based on a series of business views, to build worksheets and workbooks that report on the data from the underlying HRMS application. There are a number of predefined workbooks, which you can refine by specifying worksheet parameters; you can also build your own workbooks.

Use the following responsibility to access the predefined Discoverer workbooks:

HRMS Ad-Hoc Reporting – Administrator

This responsibility provides access to the HRMS Ad-Hoc Reporting – Administrator menu, which has the following structure:

HRMS Ad-Hoc Reporting – Administrator

- Human Resources
- Recruitment
- Training

The menu structure reflects the functional areas you need to install in order to retrieve data from the workbooks.

Discoverer End User Layer

HRMS contains a predefined End User Layer (EUL) where the data in the underlying database tables is organized in Discoverer as folders. The folders are organized into business areas. You can use this EUL to create your own Discoverer Workbooks.

Use the HRMS Ad-Hoc Reporting – Administrator responsibility to access the following Discoverer business areas:

- HRMS – Administration – Oracle Human Resources
- HRMS – Administration – Oracle Human Resources (Lists of Values)
- HRMS – Administration – Oracle Training Management
- HRMS – Administration – iRecruitment
- HRMS – Compensation and Benefits
- HRMS – General Employment Practices
- HRMS – Training Management
- HRMS – Implementation and Data Set-Up
- HRMS – Workforce Budgeting
- HRMS – Workforce Composition and Activity
- HRMS – Workforce Development and Performance
- HRMS – Workforce Recruitment

- HRMS – Workforce Separation
- HRMS – Workforce Utilization and Productivity
- HRMS – Workforce Costing

For descriptions of these Discoverer business areas, see: Discoverer End User Layer Business Area Descriptions, page 4-8

Inquiry Windows

Oracle HRMS includes some inquiry windows to meet the most common online reporting requirements. In these windows, you typically enter selection criteria in the first block then choose the Find button to view a list of people, assignments, or other entities that match your criteria. Some of these windows use *folders* to display the information retrieved by your criteria.

Folders are online views that you can configure. By default, the folder block in an inquiry window displays all records matching your inquiry and all fields available within the folder. However, you can create your own folders to display a subset of these records and fields. You can also choose the field labels, their size and order, and the sort sequence of the retrieved records.

For example, in the Assignment Folder window, you could create a folder called Sales Employees by Grade. This folder has the query criteria Organization = "Sales", and it is sorted by grade.

Predefined Reports

There are a number of predefined reports that you can use immediately without any further set up. They have a predefined format but you can choose which records to view by entering a set of parameters when you submit the report.

You can also create your own reports using Oracle Reports or SQL*Plus or another tool of your choice. You can register them with Application Object Library. This means you can run them from the standard Submit Requests window, and you can schedule them in report sets with other reports and processes.

Multilingual Reporting

Oracle HRMS enables you to print reports in the language of your choice.

HR Reports

You can select in which language the following reports are printed:

- Full Person Details
- Full Applicant Details

- Full Assignment Details
- Full Work Details

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

Payroll Reports

Payroll reports are usually submitted in the language of your Business Group, for example the US Check writer can only be printed in American English and the GB Deposit Advice can only be printed in English. However, you may be able to print payroll reports in multiple languages if your localization team has created legislation specific reports for you to use.

> **Note:** The default HRMS payrolls for the US and UK can only be run in English.

Using Oracle HRMS with Spreadsheets

You can use Oracle Application Data Exchange (ADE) to download information from the HRMS database to a spreadsheet for analysis and manipulation. For example, you can download data on current and proposed salaries for a group of employees. You can adjust the salary proposals in the spreadsheet, or enter new ones, and upload the revised data to the database. The ADE upload process reports any errors and ensures that only valid data is saved in the database.

To download information from a form to a spreadsheet using ADE, your system administrator needs to create a style in ADE. The style defines the form it is used for, the responsibilities that can use it, and the columns (or fields) to be downloaded. You determine which records are downloaded by running a query in the form before launching ADE.

A style for downloading salary proposals is predefined.

See *Using Application Data Exchange*.

QuickPaint

QuickPaint is a powerful and flexible tool to design reports about assignments in the format you require. You can include the following sorts of information in a QuickPaint report:

- Personal information
- Contact information
- Assignment information

- Application information
- Compensation and benefit information
- Descriptive flexfield information

Once you have designed a QuickPaint report, you and other users can run the report online for any assignment or set of assignments. You can view the results online or print them.

Configuring the Run QuickPaint Report Window

Using the standard QuickPaint Report window, you can run the report for an assignment or an assignment set. The assignments can be held by current employees or applicants.

Your system administrator can create configured versions of this window to restrict the reports you can run and the people you can report on. A configured version might be subject to one or more of the following restrictions:

- Report on one person type only (employees OR applicants).
- Run one report only.
- Report on single assignments only, or report on assignment sets only.

If the window is subject to the third type of restriction, it will look different to the standard version since it will contain either the assignment region or the assignment set region, but not both.

Attachments

You can add attachments to a large number of HRMS records. Examples of attachments are word processed documents, Web pages or video images.

Information Access

Does Oracle HRMS provide flexible access to information?

The information held in Oracle HRMS is an extremely valuable resource for your enterprise. You can use the same information in a variety of different ways depending on your business purpose. For example, you can use Oracle HRMS information in support of each of the following business activities:

- Performing a full range of HR functions on a day-to-day basis
- Reporting on HR activities

- Performing what-if exercises to determine the viability of alternatives scenarios
- Performing strategic planning with the Business Intelligence System

How can you use Oracle HRMS to support typical HR activities?

You can extract details about a single employee or a group of employees. Particular examples are:

- Selecting an employee or a set of employees for HR processing
- Extracting HRMS information to produce standard letters
- Viewing organization hierarchies and position hierarchies
- Viewing a historical record of previous changes

What range of reporting options are available in Oracle HRMS?

When you are reporting on activities using HRMS you may want to use each of the following reporting options depending on your business purpose:

- Define a report using parameters that you supply
- Run a predefined report
- Specify the intervals at which a report should run
- Combine several reports into a set so that they can be run at the same time
- Run a predefined Discoverer workbook.
- Create a Discoverer workbook based on the predefined End User Layer.

Can you pose "what-if" scenarios?

There will be occasions when you want to see the effect of a proposed change before deciding whether to implement it. For example, you may want to calculate the effect of a salary change for a range of employees. In these circumstances it would not be appropriate to change the data in HRMS until you have assessed the implications. Oracle HRMS allows you to transfer a copy of current data to your desktop so that you can test a succession of modifications before uploading the data to HRMS.

Can you use Oracle HRMS information for strategic planning?

Using the Business Intelligence System you can:

- Establish a set of Key Performance Indicators to provide measures of compliance for each of your business activities
- Produce reports to illustrate trends and identify future business strategy
- Make integrated use of individual reporting tools to solve complex enquiries

Can you run multilingual reports?

Yes, you can run HRMS in more than one language on a single database. This means that you can enter and report on information using more than one language. For example, your base, or source, language could be French, but you could also install German and English. You would then be able to enter and produce reports in German and English.

Administering Workforce Intelligence

Discoverer Workbooks and End User Layer

HRMS uses Oracle Discoverer to create workbooks containing worksheet reports and graphs. You can amend these workbooks to meet your enterprise's specific requirements. You can also use Discoverer User to create your own workbooks, based on the supplied Discoverer End User Layer (EUL).

You can find full instructions on developing the Discoverer EUL and creating and maintaining Discoverer workbooks in the *Oracle Discoverer Plus User's Guide* and the *Oracle Discoverer Plus Administrator's Guide*

Discoverer Workbooks

Each workbook holds a set of related worksheets. A worksheet is simply a report that returns data from a SQL query. The workbook may contain calculations and conditions that can restrict the report in various ways.

You can access Discoverer workbooks from the Self-Service menu. You can use parameters to specify the data range you want in your report. The worksheets are displayed in Discoverer Viewer.

Discoverer End User Layer

The end user layer (EUL) comprises a set of business areas, containing folders. The folders contain items that map to table columns. The folders can map to one or more database table. The folders present that data in a structure that is suitable for reporting.

There are two types of business areas: administrative and functional. The administrative business areas contain all folders. The purpose of the administrative areas is to give report developers access to all the folders to enable them to create ad hoc reports.

The functional business areas contain folders that support reporting for a specific business function, such as iRecruitment. Folders can exist in one or more functional business area. Workbooks are typically based on folders from one functional business area. You can grant users access to one or more functional business area, depending on which reports they require.

Discoverer End User Layer Business Area Descriptions

The HRMS Discoverer End User Layer provides folders that access the data from the HRMS transactional tables. You can use these folders to create your own Discoverer reports. The End User Layer organizes the folders into two types of business areas:

Administrative, and Functional.

Administration Business Areas

Use the Administration business area to produce detailed ad-hoc reports specific to the needs of your enterprise.

HRMS - Administration - Oracle Human Resources

The HRMS – Administration – Oracle Human Resources business area is a composite set of Discoverer folders focusing on different entities of the Oracle Human Resources system, such as salaries, benefits, jobs, grades and assignments. The related Lists of Values folders are in a separate business area.

Use the HRMS – Administration – Oracle Human Resources business area to produce detailed ad-hoc reports specific to your human resources needs.

HRMS - Administration - Oracle Human Resources (Lists of Values)

The HRMS – Administration – Oracle Human Resources (Lists of Values) business area contains all the Lists of Values folders relating to the Oracle Human Resources system. The folders in this business area do not appear anywhere else.

This business area is for internal use only.

HRMS - Administration - Oracle Training Administration

The HRMS – Administration – Oracle Training Administration business area is a composite set of Discoverer folders focusing on different entities of the Oracle Training Administration system, such as training events, training activities, student enrollments and event resources.

Use the HRMS – Administration – Oracle Training Administration business area to produce detailed ad-hoc reports specific to your training administration needs.

HRMS - Administration - Oracle iRecruitment

The HRMS – Administration - Oracle iRecruitment business area focuses on the vacancy and job posting details, recruitment activities, candidate details and applicant information within your enterprise.

HRMS - Administration - Oracle iRecruitment (List of Values)

The HRMS – Administration - Oracle iRecruitment (List of Values) business area contains all the Lists of Values folders relating to the Oracle iRecruitment. The folders in this business area do not appear anywhere else.

This business area is for internal use only.

HRMS - Administration - Oracle Payroll (Core)

The HRMS - Administration - Oracle Payroll (Core) business area contains folders to enable you to produce ad-hoc reports on action parameters, balance attributes, element classifications, payroll actions and so on.

This business area also contains a generic folder that can be used by any legislation to create and use complex sub folders.

HRMS - Administration - Oracle Payroll (List of Values) (Core)

The HRMS - Administration - Oracle Payroll (List of Values) (Core) business areas contains the list of values for elements, input values, organization payment methods and so on.

HRMS - Administration - Oracle Payroll (US)

The HRMS - Administration - Oracle Payroll (US) business area contains folders to enable you to produce ad-hoc reports for US payroll processing, for example, on costing, RetroPay and so on.

HRMS - Administration - Oracle Payroll (IN)

The HRMS - Administration - Oracle Payroll (IN) business area contains a folder that enables you to produce payroll run results and other standard reports.

Functional Business Areas

These business areas are grouped by function. They enable you to restrict users to a functional area in which they can develop or access workbooks specific to their functional role.

HRMS - Compensation and Benefits

The HRMS – Compensation and Benefits folders focus on entities specific to employee remuneration. From these folders you can produce ad-hoc reports summarizing and detailing such information as salary against grades and jobs.

HRMS - Employee Pay Detail - Oracle Payroll (Core)

The HRMS – Employee Pay Detail folders contain information about employee payment history and the composition of employee payments.

HRMS - General Employment Practices

The HRMS – General Employment Practices folders focus on entities specific to employment practices. Using this functional business area you can produce ad-hoc reports covering such issues as equal opportunities, minority employment, disability

accommodations, work related injuries, health and safety, disciplinary actions, grievances and interpersonal conflicts.

HRMS - Implementation and Data Set-Up

The HRMS – Implementation and Data Set-up folders provide information on system setup and data.

HRMS - Payroll Configuration - Oracle Payroll (Core)

The HRMS – Payroll Configuration folders contain information about payroll setup and configuration. You can use this information to produce ad-hoc reports on the defining characteristics of a payroll, or to compare the setup of several payrolls.

HRMS - Payroll Process Result - Oracle Payroll (Core)

The HRMS – Payroll Process Result folders contain information about the results of each payroll process that you run. You can use this information to produce ad-hoc reports identifying completed and pending processes.

Payroll Actions With Run Results and Net Pay Detail (Core)

The Payroll Actions With Run Results and Net Pay Detail folder contains the payroll run results. You can use this information to reconcile your payrolls, verify correctness of your payroll runs, and produce other standard reports.

Payroll Run Results With Net Pay (IN)

The Payroll Run Results With Net Pay folder contains the payroll run results. You can use this information to reconcile your payrolls, verify correctness of your payroll runs, and produce other standard reports.

HRMS - Training Management

The HRMS Training Management folders relate to the management of training, where the enterprise is a training provider.

HRMS - Workforce Budgeting

The HRMS – Workforce Budgeting functional business area covers all aspects relating to creating budgets. The folders contain budget information together with assignment, job, location, organization assignment, and supervisor information.

HRMS - Workforce Composition and Activity

The HRMS – Workforce Composition and Activity folders show how employees are spread throughout various areas such as jobs, geography, minority groups, and business groups. Activity information is concerned with changes in the workforce (for example, organization transfers).

HRMS - Workforce Costing

The HRMS – Workforce Costing business folders focus on costs associated with the workforce, such as the cost of training, direct payments to employees, and assignment costings.

HRMS - Workforce Development and Performance

The HRMS – Workforce Development and Performance folders focus on issues such as competency information, internal training and success.

HRMS - Workforce Recruitment

The HRMS – Workforce Recruitment folders provide information on workforce recruits, such as competencies, employment history, education, and qualifications. It also provides analysis of employee movement within and between organizations.

HRMS - Workforce Separation

The HRMS – Workforce Separation folders provide information on staff turnover, including categorizing the reasons people leave or move within an organization.

HRMS - Workforce Utilization and Productivity

The HRMS – Workforce Utilization and Productivity folders focus on issues such as how well the workforce is utilized (working hours, absence) and how productive they are.

HRMS - Pay Period Archived Data - Oracle Payroll (US)

The HRMS - Pay Period Archived Data - Oracle Payroll (US) folders provide information on federal, state and local tax archives.

Programs to Populate Workforce Intelligence Discoverer Reports

Many Workforce Intelligence reports rely on collected data, stored in summary tables, in order to run efficiently. You need to collect data from your transaction tables regularly so that the information in your reports is up to date.

You collect the data by running pre-defined concurrent programs, as described below.

For information on concurrent programs, see: Overview of Concurrent Processing, *Oracle Applications Developer's Guide*

BIS Load Organization Hierarchy Summary Table

This program creates the organization hierarchies on which HTML reports are based. When you run this program, it collects organization hierarchy structures into the

HRI_ORG_PARAMS and HRI_ORG_PARAM_LIST tables to improve reporting performance.

Prior to running the concurrent program, ensure you have one hierarchy marked as the primary hierarchy. If no hierarchy is nominated as the primary hierarchy, BIS Load Organization Hierarchy Summary Table will not pick up your hierarchies.

Add the BIS Load Organization Hierarchy Summary Table concurrent program to a request group using the Request Group window. The request group must be used by the responsibility that runs the concurrent program.

Schedule and run the request group using the Submit Request window.

> **Important:** After running each BIS Load Organization Hierarchy Summary Table request you are advised to run the system administrator request Gather Schema Statistics for the HRI schema. This will ensure that you gather statistics from the BIS Load Organization Hierarchies request.

Parameters

There are no parameters for this program.

Run frequency

You must also run this program when there are changes to organization hierarchies and you want to reflect them in your reports. Reports will not display accurate information if you do not run this program periodically to update the summary tables.

You should therefore ensure that the concurrent program is run at regular intervals, for example, every day or every week in order to collect any changed data.

If a system failure occurs, you must restart the program.

HRI Load All Organization Hierarchy Versions

This concurrent program collects your organization hierarchy structures into the HRI_ORG_HRCHY_SUMMARY table to improve reporting performance. It will perform a full refresh of all the data.

Parameters

There are no parameters for this program.

Run frequency

Run the HRI Load All Organization Hierarchy Versions concurrent program at implementation.

You must also run this program when there are changes to organization hierarchies and

you want to reflect those changes in your reports. Reports will not display accurate information if you do not run this program periodically to update the summary tables.

You should therefore ensure that the concurrent program is run at regular intervals, for example, every day or every week in order to collect any changed data.

If a system failure occurs, you must restart the program

HRI Load All Supervisor Hierarchies

The HRI Load All Supervisor Hierarchies concurrent program populates the Supervisor Hierarchy Summary Table with current and historic supervisor hierarchy data

> **Note:** The program only collects the relationships between primary assignments in order to structure the supervisor hierarchy.

Parameters

HRI Load All Supervisor Hierarchies concurrent program has the following parameters:

- **Full Refresh – Yes / No**

  If you set Full Refresh to Yes, the program will delete all information previously held in the summary table, and will recalculate the supervisor hierarchy history for the entire collection date range specified (see the Collect From Date / Collect To Date parameters).

  If you set Full Refresh to No, the program will delete none of the existing table information. It will update the summary table incrementally with any supervisor hierarchy changes that occurred within the collection date range specified (see the Collect From Date / Collect To Date parameters).

  The program runs faster if you set the Full Refresh to No.

  The default value of this parameter is Yes the first time the program is run, and No thereafter.

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

  These parameters define the start and end dates of the collection range. The program will store any supervisor changes occurring (date effectively) between these dates in the summary table.

  This date range initially defaults to be the last five years. Thereafter the Collect From Date defaults to the last Collect To Date and the Collect To Date defaults to the current date

Run frequency

At implementation, run the concurrent request, HRI Load All Supervisor Hierarchies,

with the following parameter values:

Parameter	Implementation Value
Collect From Date	The earliest date required for supervisor information (default is five years previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default)

After implementation, run the HRI Load All Supervisor Hierarchies concurrent program infrequently in full refresh mode, and frequently in incremental mode to capture and report on supervisor hierarchy changes in your enterprise (see the discussion on Full Refresh, above).

If a system failure occurs, you must restart the program

Error Handling

Loops in the supervisor hierarchy will cause the program to print an error message in the concurrent program log. A loop will occur if, for example, A supervises B, B supervises C, and C supervises A. In this case, the program will enter the person-IDs of the supervisors in the loop in the log.

Corrupt data may also produce error messages in the concurrent program log, for example, where an assignment has two date-tracked records that overlap, as shown in the table below:

Assignment With 2 Date-Tracked Records

Assignment Number	Start Date	End Date	Organization
10	1 Jan 2000	24 Apr 2000	Organization 1
10	1 Apr 2000	31 Dec 2000	Organization 2

In this example, the assignment records overlap on 1st to 24th April. To correct this situation, you should find the correct date of the organization transfer, and update the assignment record. If, for example, the transfer occurred on the 25th April, the data should be corrected to:

Corrected Assignment With 2 Date-Tracked Records

Assignment Number	Start Date	End Date	Organization
10	1 Jan 2000	24 Apr 2000	Organization 1
10	25 Apr 2000	31 Dec 2000	Organization 2

HRI Load Workforce Measurement Value History

Many reports use Workforce Measurement Values (WMVs), for example, Workforce Losses, Workforce Gains, and Workforce Count. WMVs include headcount and full-time equivalent (FTE) assignment budget values. Calculation and collection of this data could involve repeatedly running FastFormula for each assignment every time a report is run, which is expensive and increases the time taken to display the report.

To reduce the number of times the FastFormula is run, a summary table exists which holds a history of the FTE and headcount WMVs for all assignments over the collection date range. The table ensures you are getting the best possible performance from your reports.

You need to populate the summary table with the WMVs used by your reports. To populate the table, you need to run the concurrent program HRI Load Workforce Measurement Value History.

The HRI Load Workforce Measurement Value History request is not used by all reports; some reports still calculate WMV at the time of running.

Parameters

The concurrent program HRI Load Workforce Measurement History uses the following parameters:

- **Full Refresh – Yes / No**

  If you set Full Refresh to Yes, the program will delete all information previously held in the summary table, and will recalculate the WMV history for all assignments over the entire collection date range specified (see the Collect From Date / Collect To Date parameters). Use this mode the first time you run the program.

  If you set Full Refresh to No, the program will delete none of the existing table information. It will update the summary table incrementally with any WMV changes that occurred within the collection date range specified (see the Collect From Date / Collect To Date parameters).

  The program will run faster if you set the Full Refresh to No.

The following constraints apply:

- If WMVs are updated in the forms interface, the summary table will not reflect this change until you re-run the program, and only if you include the effective date of the correction (not the actual date the correction was made).

- The summary table will not reflect historical changes if you run the program in incremental mode.

  For example, if the collection date range includes today but does not include last year, the program will not pick up changes made today that update WMVs date-effectively last year.

- The program will only transfer corrections to WMV data (as opposed to updates, where historical data is retained) to the summary table when you run the program in full refresh mode.

Due to these constraints you should run the full refresh program weekly or monthly to ensure that the WMV history table is correct. If there are no corrections, deletions, or historical/backdated changes, (for example, if you implement WMVs by a FastFormula only, and do not directly store values for an assignment using the forms interface) running the incremental update at consecutive time periods will keep the table up to date.

The default value of this parameter is Yes the first time you run the program, and No thereafter.

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

  This parameter defines the start and end dates of the collection range. The program stores any WMV changes occurring (date effectively) between these dates in the WMV summary table.

  This date range initially defaults to be the previous year. Thereafter the Collect From Date defaults to the last Collect To Date and the Collect To Date defaults to the current date.

- **Collect FTE (Yes / No)**

  This parameter defines whether or not you wish to collect or update the WMV summary table with Full Time Equivalent values.

  The default value for Collect FTE is Yes.

- **Collect Headcount (Yes/No)**

  This parameter defines whether or not you wish to collect or update the WMV summary table with Headcount values.

  The default value for Collect Headcount is Yes.

Run frequency

On implementation, run the concurrent request HRI Load Workforce Measurement Value History with the following parameters:

Parameter	Implementation Value
Collect From Date	The earliest date required for WMV information.
Collect To Date	The current date (default)
Full Refresh	Yes (default)
Collect FTE	Yes (if FTE is used in reporting)
Collect Headcount	Yes (if Headcount is used in reporting)

Thereafter, Oracle recommends that you run the HRI Load Workforce Measurement Value History concurrent program monthly or weekly to capture and report on workforce measurement value changes in your enterprise (see discussion on Full Refresh below).

If a system failure occurs, you must restart the program.

HRI Load All Generic Hierarchy Versions

Some US specific Discoverer workbooks use a 'Vets, EEO, AAP, OSHA, Multi Work Sites' hierarchy. They require information about the current generic hierarchy.

The concurrent program HRI Load All Generic Hierarchy Versions calculates the required data and stores it in the Generic Hierarchy Summary table ready for use by the workbooks. These workbooks will only work if you have set up these generic hierarchies and run this concurrent program.

For further information on HRMS Generic Hierarchies see EEO-1 and VETS-100 Reporting in Oracle HRMS, available on Oracle Metalink.

The HRI Load All Generic Hierarchy Versions program collects all generic hierarchies of type "Vets, EEO, AAP, OSHA, Multi Work Sites" (system code FEDREP) across all your business groups. The program stores the data in the Generic Hierarchy Summary table.

Parameters

The HRI Load All Generic Hierarchy Versions concurrent program has no parameters.

Run frequency

Run the HRI Load All Generic Hierarchy Versions concurrent program at implementation.

You must also run this process when there are changes to the generic hierarchies and you want to reflect those changes in your reports. Reports will not display accurate information if you do not run this process periodically to update the summary tables.

You should therefore run the concurrent program at regular intervals, for example, every day or every week in order to collect any changed data.

If a system failure occurs, you must restart the process.

Workforce Calculation

Workforce is one of the key areas of your enterprise you can investigate using the Workforce Intelligence reports.

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

You can set budget measurement types and assignment measurement values for each employee assignment within Oracle Human Resources. When the report or performance measure runs, the workforce is calculated using this budget value.

If you have not entered a default budget measurement type and an assignment budget value, and a Business Group default does not exist, then the reports count workforce using Oracle FastFormula.

How Your Workforce is Counted

HRMSi provides two predefined formulas that reports use to calculate workforce if you do not enter assignment budget values for assignments. They are described below.

If you want to customize how workforce is counted, use Oracle FastFormula to copy and amend the predefined formulas. Reports will then use your customized version instead of the predefined formula. See: Customizing Workforce Calculations using Oracle FastFormula, page 4-21

> **Note:** Reports only use Oracle FastFormula to calculate workforce if you do **not** have an assignment budget value entered for an assignment. Oracle recommends setting up an assignment budget value for each employee assignment.

Predefined Formulas

HRMS provides two predefined workforce formulas:

- TEMPLATE_HEAD
- TEMPLATE_FTE

The TEMPLATE_HEAD formula calculates the headcount value as follows:

If the assignment is a primary assignment, a default value of 1 is used. Otherwise, the assignment is ignored.

The TEMPLATE_FTE formula uses the employment category to calculate the Full Time Equivalent value as follows:

- If the employment category is Full Time, the value is taken as 1.
- If the employment category is Part Time, the formula uses the standard working hours for the assignment and compares them to those on either the position, organization, or business group to determine the value for the full–time equivalent.
- If the employment category is not set up, the assignment is ignored.

The TEMPLATE_FTE formula uses the predefined meanings set up for the Lookup types EMP_CAT and FREQUENCY.

The following table lists the lookup codes and meanings for EMP_CAT (Employment Category).

Lookup Codes and Meanings for EMP_CAT (Employee Category)

Lookup Code	Lookup Meaning
FR	Full-time-Regular
FT	Full-time-Temporary
PR	Part-time-Regular
PT	Part-time-Temporary

The following table lists the lookup codes and meanings for FREQUENCY.

Lookup Codes and Meanings for FREQUENCY

Lookup Code	Lookup Meaning
D	Day

Lookup Code	Lookup Meaning
HO	Hour
W	Week

If you update a lookup meaning, you must copy and amend the predefined TEMPLATE_FTE formula.

For example, the predefined TEMPLATE_FTE has the following lines, which reference two of the Lookup meanings for EMP_CAT:

```
/* If assignment is Full Time then FTE=1 */
 IF hri_asg_employment_category_code = 'FR'
 OR hri_asg_employment_category_code = 'FT' THEN
 fte = 1
```

However, you should consider performance before customizing the TEMPLATE_HEAD formula. The TEMPLATE_HEAD FastFormula calculates the Headcount value based on whether the assignment is primary or not (1 if primary, 0 otherwise). In some cases, a report can determine this value directly, and so does not need to use the formula. This can improve report performance considerably where a large number of FastFormula calculations would be required.

This bypass is not available if you are using a customized version of the TEMPLATE_HEAD FastFormula as the logic may vary.

Configuring Workforce Calculations Using Oracle FastFormula

Typically you set up an assignment budget value for each employee assignment, and reports use this value to calculate workforce numbers. However, if you do not enter an assignment budget value for an assignment, reports use a formula to calculate workforce.

By default reports use the TEMPLATE_FTE and TEMPLATE_HEAD formulas. Copy and amend these formula templates to change the way you calculate workforce, or to report on other budget measurement types.

> **Important:** If you are using the default template formulas, this does not need to be copied to other business groups.

Workforce Calculation Formulas for DBI for HRMS

Depending on the requirements of your enterprise, to calculate workforce, you can use a formula for each business group or a global formula for the entire enterprise.

You can create:

- A BUDGET_HEAD or BUDGET_FTE formula for each business group in your enterprise.
- A GLOBAL_BUDGET_HEAD or GLOBAL_BUDGET_FTE formula for the entire enterprise. DBI for HRMS uses the global formula if business group formulas do not exist. If you have not defined a global formula either, DBI for HRMS then uses the Budget Measurement Type values. You must define the global formula in the delivered Setup Business group.

  Important: Global formulas affect the workforce calculation in all HRMS intelligence reports.

Base the formulas on the existing TEMPLATE_HEAD and TEMPLATE_FTE formulas.

To configure workforce calculations:

Use the Formula window.

1. Select either the TEMPLATE_HEAD or TEMPLATE_FTE formula.
2. Click on Edit and copy the formula body.
3. Create a new formula as appropriate:
   - BUDGET_HEAD or BUDGET_FTE for each business group.
   - GLOBAL_BUDGET_HEAD or GLOBAL_BUDGET_FTE for the entire enterprise.
4. Click on Edit and paste in the contents of the template you have copied.
5. Edit the formula code as required.

   For further information on naming and amending these formulas, see: Workforce Calculation, page 4-19
6. Compile the new formula.

Repeat the above steps for each business group within your enterprise.

Entering A Conversion Rate Type

Many Workforce Intelligence reports display financial information, such as salaries. To enable the reports to convert salaries into your selected currency, you need to enter a Conversion Rate Type.

Set the Conversion Rate Type to whatever rate you have set for the profile option BIS: Primary Rate Type.

Use the Table Values window.

To enter a conversion rate type:

1. Query EXCHANGE_RATE_TYPES in the Table field.
2. Enter BIS in the Exact field.
3. Enter the conversion type you want HRMS reports to use in the Value field, such as spot type. This must match the rate used by the BIS: Primary Rate Type profile option.
4. Save the conversion rate type.

Workforce Intelligence now uses the conversion rates set up in the General Ledger Daily Rates window for the conversion rate type you have selected.

Amending the Default Training Hours

To ensure that reports and workbooks calculate the correct hours for your training events you can customize the predefined formula.

Use the Formula window.

To amend the default training hours:

1. Copy the predefined template formula TEMPLATE_BIS_TRAINING_CONVERT_DURATION.
2. Name the new formula BIS_ TRAINING_CONVERT_DURATION.

   If you do not name the formula correctly, the reports and workbooks cannot use it.
3. Replace the number of hours a training event runs in a day.

   Example

   For example, if you record the duration of a training event in days, and within your training organization a day is 10 hours:

   In the predefined formula the number of hours are set as follows:

   ```
   hours_per_day = 8
   ```

   To set the number of hours to 10, change the code to:

   ```
   hours_per_day = 10
   ```
4. Compile the new formula.

Adding Additional Training Time Periods

If you have defined your own time periods using the FREQUENCY Lookup you must copy and amend the predefined formula. If you do not add your additional time periods to the formula the hours for these events will not be included in the report and workbooks.

Use the Formula window.

To Add Training Time Periods:

1. Copy the predefined template formula TEMPLATE_BIS_TRAINING_CONVERT_DURATION.

2. Name the new formula BIS_ TRAINING_CONVERT_DURATION.

   If you do not name the formula correctly, reports and workbooks cannot use it.

3. Update the formula to add the code.

   Example

   For example, if you set up a time period called Fortnight using the Lookup code of F (Fortnight), you need to amend the formula as follows:

```
/* Main Body of Formula */
 hours_per_day = 8
 hours_per_week = hours_per_day * 5
 hours_per_fortnight = hours_per_week * 2
 hours_per_month = hours_per_week * 4.225
 hours_per_year = hours_per_month * 12

/* Calculate Duration in Hours */
 IF (from_duration_units = 'Y') THEN
  hours = from_duration * hours_per_year
 ELSE IF (from_duration_units = 'M') THEN
  hours = from_duration * hours_per_month
 ELSE IF (from_duration_units = 'F') THEN
  hours = from_duration * hours_per_fortnight
 ELSE IF (from_duration_units = 'W') THEN
  hours = from_duration * hours_per_week
 ELSE IF (from_duration_units = 'D') THEN
  hours = from_duration * hours_per_day
 ELSE IF (from_duration_units = 'H') THEN
  hours = from_duration
 ELSE
  hours = 0

/* Calculate Duration in desired units */
 IF (to_duration_units = 'H') THEN
  to_duration = hours
 ELSE IF (to_duration_units = 'D') THEN
  to_duration = hours / hours_per_day
 ELSE IF (to_duration_units = 'W') THEN
  to_duration = hours / hours_per_week
 ELSE IF (to_duration_units = 'F') THEN
  to_duration = hours / hours_per_fortnight
 ELSE IF (to_duration_units = 'M') THEN
  to_duration = hours / hours_per_month
 ELSE IF (to_duration_units = 'Y') THEN
  to_duration = hours / hours_per_year
 ELSE
  to_duration = 0
RETURN to_duration
```

4. Compile the new formula.

Granting Business Area Access

The SYSADMIN user and users with a valid HRMS responsibility automatically have access to all HRMS Discoverer business areas.

You can grant access to specific business areas for users or responsibilities. This enables users to create or view workbooks only in the business areas they have access to.

Typically, you provide the majority of report users with read-only access to specific business areas, thereby enabling them to only view workbooks in those business areas.

1. Grant access to business areas for users or responsibilities.

   For a detailed explanation of how to grant access to business areas, see: Set Privileges for the Current EUL in *Oracle Discoverer Administrator Administration*

Guide.

Check the Vacancy Status Options

The vacancy reports only count vacancies as closed if they have the system vacancy status of CLOSED. However, if your system was installed prior to 11.5.9, you may have two vacancy status options that users can use to close a vacancy: Closed, and Closed (1). The Closed option has a system vacancy status of C, whereas the Closed (1) option has a system vacancy status of CLOSED.

To ensure the vacancy reports return accurate results, you need to obsolete the old vacancy status option of Closed that returns the status of C. You can also update the name of the Closed (1) option.

If you want reports to include previously closed vacancies, you may also need to update their system vacancy status from C to CLOSED.

Use the Application Utilities Lookups window.

To update the Vacancy Status Options:

1. In Enter Query mode, enter VACANCY_STATUS in the Type field, and execute a query.

   Both Closed and Closed (1) may appear in the list of vacancy status options.

2. If both options appear, insert an end date of the current date against the Closed option that has a code of C.

   This will remove that Closed option from the list of vacancy status options, and prevent C being used as a system vacancy status.

3. In the Meaning field, rename the Closed option to something else, for example, Closed_old.

4. In the Meaning field, rename the Closed (1) option to Closed. Ensure is has the code of CLOSED.

What's Next

If necessary, update the system vacancy status of previously closed vacancies from C to CLOSED.

Populating the Organization Hierarchy Summary Table

Reports that use organization hierarchy retrieve your organization structure from the HRI_ORG_HRCHY_SUMMARY table. Use the HRI Load All Organization Hierarchy Versions concurrent program to collect your organization hierarchy structures into the

summary table. The process will perform a full refresh of all the data.

Use the Submit Requests window.

To populate the Organization Hierarchy Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Organization Hierarchy Versions and submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Organization Hierarchy Versions, page 4-13

Populating the Supervisor Hierarchy History Table

All reports that use supervisor hierarchy retrieve your current and historic supervisor hierarchy data from the Supervisor Hierarchy Summary table. Use the HRI Load All Supervisor Hierarchies concurrent program to collect your organization hierarchy structures into the summary table.

Use the Submit Requests window.

To populate the Supervisor Hierarchy History table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Supervisor Hierarchies.
3. At implementation, set Full Refresh to Yes in the Parameters window.
4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Supervisor Hierarchies, page 4-14

Populating the Workforce Measurement Value History Table

Many reports use Workforce Measurement Values (WMVs), for example, Workforce Losses, Workforce Gains, and Workforce Count. WMVs include headcount and

full-time equivalent (FTE) assignment budget values.

Populate the Workforce Measurement Value History table with the WMVs used by your reports. To populate the table, you need to run the concurrent program HRI Load Workforce Measurement Value History.

Use the Submit Requests window.

To populate the Workforce Measurement Value History table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load Workforce Measurement Value History.
3. At implementation, use the following parameter values:

Parameter	Implementation Value
Collect From Date	The earliest date required for WMV information.
Collect To Date	The current date (default)
Full Refresh	Yes
Collect FTE	Yes (if FTE is used in reporting)
Collect Headcount	Yes (if Headcount is used in reporting)

4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load Workforce Measurement Value History, page 4-16

Populating the Generic Hierarchy Summary Table

Some US specific Discoverer workbooks use a 'Vets, EEO, AAP, OSHA, Multi Work Sites' hierarchy. They require information about the current generic hierarchy.

Run the concurrent program HRI Load All Generic Hierarchy Versions to calculate the required data and store it in the Generic Hierarchy Summary table ready for use by the workbooks. These workbooks will only work if you have set up these generic

hierarchies and run this concurrent program.

Use the Submit Requests window.

To populate the Generic Hierarchy Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Generic Hierarchy Versions.
3. Submit your request.

What's Next

For a full discussion of the HRI Load All Generic Hierarchy Versions concurrent program, see HRI Load All Generic Hierarchy Versions, page 4-18

Collecting Organization Hierarchy Structures

The BIS Load Organization Hierarchy Summary Table concurrent program creates the organization hierarchies on which the Discoverer End User Layer folder Organization Rollup – Current is based. If you create any reports based on the Organization Rollup – Current folder, you need to run this program to collect organization hierarchy structures into the HRI_ORG_PARAMS and HRI_ORG_PARAM_LIST tables.

1. **Define Primary Organization Hierarchy**

   Prior to running the concurrent program, ensure you have at least one organization hierarchy marked as the primary hierarchy. If no hierarchy is nominated as the primary hierarchy, BIS Load Organization Hierarchy Summary Table will not pick up your hierarchies.

   See: Creating Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

2. **Add BIS Load Organization Hierarchy Summary Table to a Request Group**

   Add the BIS Load Organization Hierarchy Summary Table concurrent program to a request group.

   See: Adding BIS Load Organization Hierarchy Summary Table to a Request Group, page 4-30

3. **Populate the Organization Hierarchy**

   Schedule and run your request set that contains the BIS Load Organization Hierarchy Summary Table concurrent program using the Submit Request Set window.

   See: Populating the Organization Hierarchy Tables, page 4-30

Adding BIS Load Organization Hierarchy Summary Table to a Request Group

If you have created reports based on the Organization Rollup – Current folder in the Discoverer End User Layer, you must run the BIS Load Organization Hierarchy Summary Table concurrent program to populate organization hierarchy summary tables.

See: Populate the Organization Hierarchy Tables, page 4-30

Prior to running this program you must add it to a request group. The request group should be used by the responsibility that runs the concurrent program.

Use the Request Groups window.

To add BIS Load Organization Hierarchy Summary Table to a request group:

1. Enter the name of the group to which you want to add the program.
2. Enter Oracle Human Resources in the Application field.
3. Select Program as the Request Type.
4. In the Name field, select BIS Load Organization Hierarchy Summary Table
5. Save the change to the request group.

Populating the Organization Hierarchy Tables

If you have created reports based on the Organization Rollup – Current folder in the Discoverer End User Layer, you must populate organization hierarchy summary tables. Use the BIS Load Organization Hierarchy Summary Table concurrent program to populate the tables.

Prior to running the concurrent program, ensure you have at least one hierarchy marked as the primary hierarchy. See: Creating Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

Prior to running this program you must also add it to a request group. See: Adding BIS Load Organization Hierarchy Summary Table to a Request Group, page 4-30

Use the Submit Request Set window.

To populate the Organization Hierarchy tables:

1. Select Request Set in the Submit a New Request window.

2. In the Request Set field, select the name of your request set that includes BIS Load Organization Hierarchy Summary Table and submit your request.

What's Next

Define when you want to run this request set using the schedule options.

For further information on the BIS Load Organization Hierarchy Summary Table concurrent program, see BIS Load Organization Hierarchy Summary Table, page 4-12

Using Attachments

You can attach short comments, word processed documents, images, video, OLE objects, or Web pages to many records in Oracle HRMS. For example, you could attach a resume to an applicant record and a position description to a position record.

Each record can have one or more attachments, and you can copy attachments from one record to another. You can store the attachments in the database or in your file system.

To view attachments or add new attachments:

Click the Attachments icon. By default, clicking the attachments icon displays a Comments window where you can enter text up to 2000 characters. This is the Comments facility available in earlier releases of Oracle HRMS. If you want to replace this facility with the ability to attach multiple items, ask your system administrator to set your user profile option HR:Use Standard Attachments to Yes.

The HRMS entities that support attachments are:

- Absence
- Absence Type
- Address
- Application
- Assignment
- Balance (Oracle Payroll)
- Batch Header
- Booking
- Budgets
- Budget Version

- Calendar
- Career Path
- Collective Agreements
- Consolidation Set (Oracle Payroll)
- Contact Relationship
- Contracts
- Customization
- Element
- Element Entry
- Element Link
- Element Set
- Event
- Grade
- Grade Rate
- Job
- Job Evaluation
- Job Requirement
- Letter Type
- Monetary Unit (Oracle Payroll)
- Organization
- Organization Payment Method
- Organization Hierarchy
- Pay Scale
- Payroll Process (Oracle Payroll)

- Period of Service
- Person
- Person Analysis/Special Information
- Personal Payment Method
- Position
- Position Hierarchy
- Recruitment Activity
- Requisition
- Salary Basis
- Salary Proposal
- Salary Proposal Component
- Secondary Assignment Status
- Special Information Type
- Status Processing Rules (Oracle Payroll)
- Vacancy
- Valid Grade

Using Inquiry Windows and Folders

You can define public folders, which all users can view, as well as private folders for your own use.

1. See: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

Inquiry Windows in Oracle HRMS

Inquiry Window	Information Provided
Assignments Folder	Lists of assignments in a folder

Inquiry Window	Information Provided
Employee Assignment Processes (Oracle Payroll - UK and US legislations only)	All the assignment processes for one employee assignment, which you can view, retry or roll back, with further information on run messages, run results, balances, payment details and costing
Payroll Processes (Oracle Payroll - UK and US legislations only)	All the payroll processes for one payroll for a specified period, which you can view, retry or roll back, with further details on assignment processes, run messages and costing
People Folder	Lists of people in a folder
Salary Management Folder	List of assignments with their current approved salary and proposed new salary
Position Occupancy Folder	Lists of people who have held a selected position, or are applying for it, and the dates of their occupancy
List Assignments	Assignments that match the assignment components you specify for current applicants, employees, or both
List People by Assignment	People whose assignments match the assignment components you specify for current or former applicants, employees, or both
List Employees by Organization	All employees assigned to one organization and, optionally, to all organizations below it in a specified hierarchy
Assignment History	The dates of assignments and periods of service for an employee who has had more than one assignment.. NOTE: use DateTrack History on the Assignment window to see historical changes to one assignment
List Employees by Position	All employees assigned to a specified position or organization and job
List Employees by Position Hierarchy	Current holders of positions at and below a specified position in a position hierarchy
View Employee Grade Comparatio	The amount employees receive for a specified element as a percentage of the mid-value of their grade rate range

Inquiry Window	Information Provided
List Employees by Absence Type	All absences of a particular absence type or category within, optionally, a specified time period
View Employee Absence History	Periods of absence for a specified employee
List People by Special Information	All people for whom you have entered details about a specified special information type
List Employees by Element	All employee assignments receiving a specified compensation element within a given time period
View Element Entry History for Employee	The history of entries of one or more elements for an employee assignment
List Position Budget Variance	Variances between the number of actual position holders and the values entered in a specified budget for positions below a chosen position in a hierarchy
List Budget Variance by Organization	Variances between the number of actual position holders and the values entered in a specified budget for all positions in organizations at and below a chosen organization in a hierarchy
View Employee Benefits (US only)	View benefit plans on which an employee is enrolled and the coverage level and contributions for each plan
View Vacancies	Vacancies matching assignment components and other criteria you select

Running Predefined and User Defined Reports

1. Reports originating from SQL*Plus or Oracle Reports run in batch mode. You submit them for processing in the Submit Requests window, and you can view their progress using the Requests window. The requests are handled by a *concurrent manager* so you can continue working online while your request is processed.

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

2. You can schedule the reports to run regularly and you can group them with other reports and processes to run as a set. You can also control access to the reports and

control their printing. For example, the system administrator may want to ensure that users in one location always print their reports on a local printer.

See: Reports and Processes in Oracle HRMS for a list of predefined reports and processes.

You can create your own reports using Oracle Reports or SQL*Plus or another tool of your choice. You can register them with Application Object Library. This means you can run them from the standard Submit Requests window, and you can schedule them in report sets with other reports and processes.

Defining QuickPaint Reports

You can design QuickPaint reports in the Define QuickPaint Report window.

In the Report Definition area, you can enter *free text* to introduce the report and to label the information that the report extracts from the database. You can also select *database items*, which are tags representing the information to be extracted from the database. When you run the report, the database item names are replaced by the appropriate data for the assignment or set of assignments for which the report is run.

You must be careful how you position the database items so that QuickPaint interprets them correctly and formats the report in the layout you require.

To define a QuickPaint Report:

1. Enter a name, and optionally a description, of the report.

   The Protected field is display only; some reports provided by localization teams are protected against edits.

2. In the Report Definition area, enter free text exactly as you want it to appear on the report.

3. To select database items, choose the Show Items button and run a query to display a list of database items, then select and copy items to the Report Definition area.

   Notice that the database item name must begin with an ampersand (&). Names without an ampersand are treated as free text.

4. Save the report definition.

Positioning Items

If you want to add free text immediately after a database item, you must separate it from the database item with at least one space. Otherwise QuickPaint reads the database item as free text.

Both free text and database items appear in the report results on the line on which you painted them in the Report Definition area. They also generally appear in the column in

which you painted them. However, it might be that the data replacing a database item name is long enough to push later items on the same line to the right.

For example, if you paint database items and free text like this:

```
&ASG_JOB       in &ASG_ORG
```

the report results print like this:

```
Technician     in Biochemistry
Scientific Officer in Biochemistry
```

Notice that, in the second result, the free text 'in' is pushed to the right and one space is entered before it.

If you know the number of the column in which you want text or a database item to appear, you can enter it like this:

```
&ASG_JOB       &32in &ASG_ORG
```

However, the text 'in' will still be pushed to the right if the preceding database item (&ASG_JOB) extends beyond column 32. If you would prefer the preceding database item to be truncated, paint the line as follows:

```
&ASG_JOB       &&32in &ASG_ORG
```

The report results will look like this:

```
Technician     in Biochemistry
Scientific Off in Biochemistry
```

If you want one space between two database items or between a database item and text, then paint them separated by a single space. The single space is always preserved. For example, this definition:

```
&EMP_FIRST_NAME &EMP_LAST_NAME
```

gives the following report results:

```
Alice Hollister
Ray Garcia
```

Adding Conditions or Calculations to QuickPaint Reports

When you save a report definition, QuickPaint generates a formula to extract the information required by the report. You can view this formula in the Formulas window. To query the formula, enter the name of your QuickPaint report.

Formulas generated from QuickPaint definitions do not contain conditional logic or mathematical computations. If you need these features, query the formula in the Formulas window and copy it. Edit the copy to add the logic you require.

> **Important:** You should not edit the original QuickPaint formula. Always edit a copy. Any edits of the original formula are overwritten if you change the report definition in the QuickPaint Report window.

Running QuickPaint Reports

You run QuickPaint reports from the Run QuickPaint Report window. You can run a report for one assignment or for a group of assignments.

To run a report for one assignment:

1. Select the type Assignment.
2. In the Assignment region, select the assignment for which you want to run the report.
3. In the Report field, select the report you want to run.
4. Choose the Run Report button.

   The message line tells you when the report is complete.
5. Choose the View Report button to see the report results.

When you run a QuickPaint report, the system runs the formula associated with the report. The first time you run a report, the system may take several seconds to identify all of the related data and bring it back to the screen. All subsequent inquiries for other employees or applicants will run very quickly.

To run a report for an assignment set:

1. Select the type Assignment Set.
2. In the Assignment Set region, select the assignment set for which you want to run the report.
3. In the Report field, select the report you want to run.
4. Choose the Run Report button.

   The message line tells you when the report is complete.
5. Choose the View Report button to see the report results.

Defining Concurrent Process Custom Reports

The Custom Reports function provides a generic reporting capability that makes use of a single report to print out a custom definition. This report is called PERGENRP.

The report is registered as a concurrent process and prints, in landscape format, the contents of the temporary table PER_GENERIC_OUTPUT_REPORT.

This table contains the individual components of a custom report and is populated by the PL/SQL package PERGENRP.pkb, stored in $PER_TOP/admin/sql. This package is executed when you select the Generate Report button on the Custom Reports window.

To submit a Custom Report:

1. Navigate to the Custom Reports window.
2. Select the report by name.
3. Enter any parameters for this report.

   Important: Parameter values are not validated until you choose the Generate Report button.

4. Choose the Generate Report button

   The default for the report is to print the output automatically. It is a System Administrator task to set default printers for all users, or to reset this option on the Concurrent Program window.

Creating New Report Formats

A special feature of Custom Reports is that you do not need to create multiple reports. You modify the generic package (PERGENRP.pkb) and report to provide additional formats and parameters.

Three sample report formats are provided, each with a different set of parameters:

- PERCS001 - Custom Report 1

  There is one parameter: Vacancy. The format in PERGENRP is *Full Name of Applicant* and *Gender*.

- PERCS002 - Custom Report 2

  Parameters are Vacancy and Gender. The format in PERGENRP is *Full Name of Applicant* in uppercase.

- PERCS003 Custom Report 3

  Parameters are Vacancy, Gender and Marital Status. The format in PERGENRP is *Full Name of Applicant*, *Gender* and then *Full Name* in uppercase.

You can edit the generic package to change:

- Report Title Page
- Header
- Footer

- Body Text

After you have modified the package, you need to register a new custom report, with the parameter set for that report. This is a task for the System Administrator.

To register a new Custom Report with parameters:

1. Navigate to the Concurrent Programs window.
2. Enter the name of the Custom Report as the Program.
3. Enter a short name for the Custom Report.

   Important: You must start the short name with PERCS. This will limit the list of values available to users in the Custom Report window.

5

Interface Configuration

Interface Configuration Overview

Oracle HRMS provides functionality that enables you to enter and update large groups of element entries, to extract records from the HRMS tables to send to third parties, and to upload legacy data and information supplied by third parties into the HRMS tables.

You can use BEE (Batch Element Entry) to enter or update a batch of element entries for many employees, using defaults for fast entry. For example, to ensure that the data entry process is fast and that the data entered is accurate, you can use BEE to enter timecard data needed for regular pay processing,

See: Batch Element Entry, page 5-27

System Extract lets you manage the formatting, extraction, and delivery of HRMS data to benefits carriers, payroll providers, and other third-party vendors. For example, you can use System Extract to extract records for benefits plans into an extract file that you then transmit to a third-party benefits carrier.

See: Benefits System Extract, page 5-3

The Oracle HRMS Data Pump loads legacy data into the Oracle HRMS tables using a set of predefined batch tables and standard processes that simplify the tasks of data-loading using supported APIs.

You map the data items from your external system to the parameter values of the appropriate APIs, load your data into a single generic batch lines table, and then run a process that automatically calls the appropriate API for each line of data in the batch table.

See: Data Pump, *Oracle HRMS Data Pump (Technical Essay)*

Oracle Generic Third Party Backfeed enables you to upload information supplied by a third-party payroll system into the Oracle HRMS tables. For example, you can load payment information and balance details calculated by a third-party payroll system and then view this information using Oracle HRMS windows and generate reports based on this information.

Backfeed holds the uploaded data in Backfeed tables that are independent of Oracle Payroll.

See: Payroll Backfeed, *Oracle Generic Third Party Payroll Backfeed (Technical Essay)*

Interface Configuration

Can you enter weekly timecard data?

Yes, using Batch Element Entry, you can enter timecard information for a group of employees, using default values as appropriate. You can validate your entries against system rules and external control totals before uploading it to the database in time for the payroll run.

I'm entering compensation details for analysis but not for payroll processing. How do you reduce data entry work to a minimum?

If the same compensation entry applies to a group of employees, the system can enter it automatically. You need to set up the element with *standard links*. Use Batch Element Entry to start or update other entries in batches.

You can download salary information to a spreadsheet, update it there, and upload the new information to the database.

Can you migrate legacy data in Oracle HRMS?

Yes. You can use the Data Pump to update and load legacy data into the Oracle HRMS tables. You load data from an existing HRMS system into a single batch interface table using a set of supplied PL/SQL interface routines that map the data against the appropriate API. The data pump engine then uploads the data into the Oracle HRMS system.

Does Oracle HRMS provide an open interface with third-party systems?

Yes. The Oracle HRMS Data Pump provides data transformation, validation and adapters for connectivity to third-party systems.

System Extract

System Extract

Many human resource departments outsource at least some of their compensation and benefits administration processing to third-party carriers, payroll providers, or other vendors. Thus, there is a great need for reliable data exchange between plan sponsors and these third parties.

You can use System Extract to extract records for a variety of plans, including compensation and benefits plans and absence plans. You can also use or modify predefined HR/Payroll extracts to gather employee and payroll data, such as the details of earnings, deductions, and information elements. You can use the extract reports for internal reporting, such as listing all employees in receipt of a bonus, or for transfer to third-party providers, such as pension providers. See: HR/Payroll Extracts, *Oracle HRMS Compensation and Benefits Management Guide*

> **Note:** System Extract does not actually remove any data from the source.

To extract records from the database for transmission to a third party, you must define the *criteria* that determine which records are extracted. You can restrict extract data according to a wide range of criteria such as organization, plan, and data that has changed since the previous extract. You must also define the *layout* of the extracted records, including the data elements and date ranges.

After you create your extract definition, you run the system extract concurrent process to create your extract results. You can then review these results, including any errors that occurred during the process. When you are satisfied with the results of the extract, you can transfer the extract file to the medium by which you transmit or store the extract results.

The system extract process consists of four main steps, outlined below:

1. Define the Extract Layout, page 5-11
2. Define the Extract Criteria Profile, page 5-8
3. Define the System Extract, page 5-17
4. Run the System Extract Concurrent Processes, page 5-21

Extract Layout

You create an *extract layout definition* to control the data elements that are included in

the extract and the format of the extract results.

An extract layout consists of data elements and their formatting, record layouts that define which data elements appear in the header, subheader, detail, trailer, and sub-trailer areas of the extract, and a file layout that specifies the order of the records.

Your extract layout also indicates the sort order of the records and any conditional record inclusion criteria that you define.

For example, you could create an extract layout definition for the enrollment results of the medical plans offered by your organization. You define data elements such as the participant's first name, middle name, last name, and the plan they elected. Then, in your record layout, you arrange these data elements within five areas: detail, header, sub-header, trailer, and sub-trailer. Finally, you create a file layout by sequencing these record layouts.

Data Elements

Data elements are individual data components which contain values that you include in an extract. Different *data element types* can contain different values. You use your data element definitions in conjunction with your extract criteria definitions to restrict the data that is included in the extract. The data element types are as follows:

- *Fields* are most often data extracted from a database field, but can also include common header and trailer totals, subheader elements for non-person data, dates, and other filler information. You cannot update the list of fields delivered with the system.

- *Decoded Fields* display a different value in the extract than is stored in the database. For example, if you store the values for Male and Female as M and F, you can set the values as Male and Female.

- *Record Calculations* calculate the total of two or more data elements in a record. You can add, subtract, multiply, or divide extracted data.

- *Strings* are groups of characters such as words or sentences.

- *Rules* enable you to create data elements not included in the supplied list of data elements.

- *Totals* appear in the header or trailer of a record. You can sum the results of any data element or include a count of the number of records. You can add conditions to display the sum of data elements only where the value is equal to a specified value.

You can format different data element types in different ways. Depending on the data element type, you can specify justification, format mask, maximum length, and other formats.

If the seeded format masks are insufficient, you can add format masks to the system's

number and date lookups. You use a lookup code that begins with 'N' for numeric format masks or 'D' for date format masks. You cannot define your own format mask for phone numbers or social security numbers.

> **Note:** A system administrator familiar with Oracle formats should enter this information.

You can sortthe data elements in a record by up to four levels based on any data element you include in the extract. Sorting can occur on each record in a file layout.

Record Layout

You specify the data elements to be included in the header, subheader, detail, trailer, and sub-trailer portions of your record layout. Typically, the header and trailer portions of a record contain *control* information, such as file identifying information, dates, and totals. Detail records contain the content and values of an extract. Subheader elements contain non-person data, such as organizations and positions, that you use to order person information contained in the detail portion of the layout.

You can specify Required data elements. If a required data element is missing, the entire record is written to the error log during the extract process and no extract result is created for that record.

You can also choose to *hide* a data element from an extract record when you run the write process. Hidden data elements appear in the extract result after you run the extract process, but are hidden when you initiate the extract write process. Hiding enables you to use a sensitive field such as salary to determine included or excluded records without exposing the field value to unauthorized personnel.

File Layout

You define a file layout to create the sequence (from right to left) in which the records display in an extract. Sequence numbers are unique.

Extract Criteria

The extract criteria you select determine the data that is extracted by filtering the data. Data that does not meet your extract criteria is not extracted. You can select from several groupings of criteria that you combine to create an *extract criteria profile*.

- *People* limits your extract results to an individual or to people who meet the criteria you select, such as assignment location, organization, or benefits group.
- *Benefits* limits your extract results to a particular plan or reporting group, including dependents.
- *Changes* limits the extract to data that has changed according to a number of criteria types such as element and input values.

- *Payroll* limits the extract to specified types of payroll and element entries.
- *Communications* limits the extract to specific communication types and dates.
- *Premium* enables you to extract premiums for a single month or for a range of dates, or restrict a premium extract to the last occurrence of a record update.
- *Compensation* limits the data extract to specific plans that you have defined in Compensation Workbench.
- *Sub Header* limits the data extract based on non-person data, such as organization, position, or payroll, that you include in the sub header region of the extract file layout.
- *Advanced* criteria creates an extract for a change event when you have complex criteria for selecting records; you can select records for a change event over one or more periods of time, and by the actual date and/or effective date of change.

Extract Definition

The extract definition combines a layout (what you have chosen to include) and a criteria profile (what you have chosen to restrict), enabling you to reuse layouts and profiles in different combinations. Here you define parameters for the system extract concurrent process that you run to create the extract result.

You can output the extract data as a text file or an XML file.

See: XML-Enabled System Extracts, page 5-7

Extract Processing

You extract the data by running a pair of concurrent processes, the Extract Process and the Extract Write Process. While you are testing your extract, you run the processes separately, but after testing you will typically run them together in a request set. You can run various reports to view the results.

Extract Concurrent Processes

You run the **Extract Process** from the Concurrent Manager to create results for an extract definition. After you run the extract process, you can view the results in the Extract Results window. The extract process generates a summary report and an error report. You can run the **Extract Audit Report** to view a limited selection of records from the extract results.

You run the **Extract Layout Report** to extract just your layout definition with no data. This is useful for reviewing the format of the layout. Benefit carriers may also find this information useful in helping them import the extract result into their systems.

Use the **Extract Results Data Purge** process to remove unwanted data from the extract

results tables. Purging unneeded data helps save table and disk space.

See: Purging System Extract Results, page 5-22

Extract Results

The Extract Process automatically runs the **Extract Summary** report (you can also run the report separately for any existing extract). Run the **Extract Error Report** to view any errors that occurred during the extract process.

The Extract Results window displays detailed information about an extract. If your security profile prevents access to certain person information, the window hides those person records. However, summary totals display based on the entire population, regardless of your security profile.

You can view (but neither change nor delete) the change events for a person from the Change Event Log, shared with Oracle Payroll.

To maintain application performance, you should periodically purge unwanted data from the extract change log tables by running the Extract Change Event Log Purge process.

See: Purging the System Extract Change Log, page 5-23

Extract Write Process

Once you are satisfied with the results of your extract, you run the **Extract Write Process** from the Concurrent Manager to save the output of the extract to the directory and file you specified in your extract definition.

See: Running the System Extract Concurrent Processes, page 5-21

System Extract Migration

You can migrate a system extract to another business group or database instance. To save time during implementation, build a system extract once, then copy the data elements, record and file layouts, and extract criteria that comprise the extract definition.

> **Note:** To copy an extract within a business group, use the Extract Definition window. To modify a seeded extract, you must copy it and use the copy.

See: Migrating a System Extract, page 5-25

XML-Enabled System Extracts

You can use System Extract to generate an XML file for data transfer. Unlike ASCII files that rely on character ordering and spacing, XML files use tags to identify data types.

When you define the Extract Definition, you can create either a TXT or an XML formatted file. If you select XML, the Extract Process generates the following files:

- XML file
- XSL file (style sheet)
- XSD file (schema)

The XML file contains the data along with the XML tags. The recipient of the extract--such as a benefits provider--uses the XSL file to determine the layout of the XML file. The XSD file allows you to view the XML file in a web browser.

Each tab in the Extract Layout and Extract Definition forms contains a field called XML Tag. The XML tag defaults to the name you assign each record. You can change the name of the XML tag at anytime prior to running the Extract Process. A tag can contain up to 80 characters and does not allow spaces, numbers, or special characters.

Tag names do not need to be unique. If you extract XML for an existing extract that has no tags defined, the Extract Process uses the lookup codes contained in the BEN_EXT_XML_TAGS Lookup Type to populate the tags in the extract results.

Converting XML to PDF

Using Oracle XML Publisher, you can predefine a PDF template, then merge the template with XML output from a system extract to create a PDF file of your extract.

In HRMS, you link the PDF template that you created in XML Publisher to the extract definition. The Extract Process process calls the Extract XML Publisher process if you select Submit Write Process Automatically, or if you run the Extract Write Process for an extract with PDF Output as the extract type.

See: XML Publisher Introduction, *Oracle XML Publisher User's Guide*

See: Running the Extract XML Publisher Process, page 5-24

Defining an Extract Criteria Profile

You use the Criteria Definition window to create an *extract criteria profile* that limits the results of a system extract to records that match your extract criteria.

To define an extract criteria profile:

1. Enter an extract criteria Profile Name or query an existing profile that you want to modify.
2. Choose a tabbed region that represents a criteria category you want to include in your profile.

- *People* limits your extract results to an individual or to people who meet the criteria you select, such as assignment location, organization, or benefits group.
- *Benefits* limits your extract results to a particular plan or reporting group, including dependents.
- *Changes* limits the extract to data that has changed according to a number of criteria types such as element and input values.
- *Payroll* limits the extract to specified types of payroll and element entries.
- *Communications* limits the extract to specific communication types and dates.
- *Premium* enables you to extract premiums for a single month or for a range of dates, or restrict a premium extract to the last occurrence of a record update.
- *Compensation* limits the data extract to specific plans that you have defined in Compensation Workbench.
- *Sub Header* limits the data extract based on non-person data, such as organization, position, or payroll, that you include in the sub header region of the extract file layout.
- *Advanced* criteria creates an extract for a change event when you have complex criteria for selecting records; you can select records for a change event over one or more periods of time, and by the actual date and/or effective date of change.

  Note: If you define an extract criteria profile that uses change events, you must enable these change events in the Application Utilities Lookups window. Query the Lookup code BEN_EXT_CHG_EVT and select Enable for each change event you want to enable.

3. Select a Criteria Type that limits the records to include in this extract.
4. Select a criteria value based on the criteria type you selected.
5. Check the Exclude field if this criteria type and value is excluded from appearing in your extract.

   If you select Person Assignment Set, and the set you already defined in Payroll is set to Exclude, checking Exclude here would actually *include* the data in the assignment set.
6. Optionally, select Rule to use a FastFormula rule that you have written to filter data based on criteria that you define.

Use the Extract Person Inclusion rule type for People criteria, or the Extract Sub Header Inclusion rule type for Sub Header criteria.

7. Repeat steps 2-6, page 5-8 for each criterion that you are including in this extract criteria profile.

8. Save your work.

To define an extra criteria profile using Advanced criteria:

1. Enter or query an extract profile in the Profile Name field.

2. Select the criteria types and values that you want to include in this extract criteria profile.

3. Choose the Advanced tab.

4. Select the Criteria Type of Combination.

5. Navigate to the Advanced Criteria window by clicking into a Value row and choosing the Details button.

6. Select a Criteria Type. Choose from:

   - Change Actual Date
   - Change Effective Date
   - Change Event

7. Select an Operator to limit the criteria values.

   Note: For change dates, select either equals (=) or between as the operator. For change events, select either equals (=) or does not equal (!=).

8. Select a change value in the Value 1 field.

   Note: For change dates, select a value that specifies a period of time, such as Last Day of Previous Month. For change events, select a particular change event.

9. Select another value in the Value 2 field if you are adding more criteria values to this extract profile or if you are comparing values in the Value 1 and Value 2 fields.

10. Save your work.

Defining an Extract Layout

You use the Layout Definition window to define the data elements, records, and format of the records that are extracted by your extract definition.

Your *extract layout definition* consists of the data elements to include in the extract, the record layout that controls the records that appear in the header, footer, and detail areas of your extract, and the file layout that defines the records to include in the extract.

See: Extract Layout, page 5-3

Data Elements

You use the Data Elements tabbed region to select the data elements to include in an extract and to define the layout format of each data element.

To define the layout format of a data element:

1. Enter the Name of the data element you are defining.

2. Select the data Type of the data element.

   Note: Depending on the data type you select, the system presents different formatting options for that data element.

3. Enter an XML tag name if you output the system extract file in XML format.

   Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.

4. If you select the **Field** data element type, enter values for several parameters. Field data elements are most often data extracted from a database field, but can also include common header and trailer totals, subheader elements for non-person data, dates, and other filler information. You cannot update the list of fields delivered with the system.

   - Select the Field.

   - For numbers, dates, phone numbers, and national identifiers, select a Format Mask that formats the results of the value. For example, you can set the capitalization of all extracted records to Uppercase, Lowercase, or Initial Capitals.

- Select the Justification, left or right. The default justification is left justified. For data elements with a number value, you typically select right justified.
- Enter a value or character string to use when the value for the data element is null in the When Null Use field.
- Enter the maximum number of characters to include in this data element in the Max Length field.

  Note: You can include a maximum of 300 elements in a record. To add more than 300 elements to a record, select the Extract Record Continuation (Links Two Records Together) element. You can only use this element for detail records. If you add this element as the last element to any record, the Extract Write Process appends the next record to the same line.

5. Enter values for the following parameters if you select the **Decoded Field** data element type. Decoded Fields enable you to display a value that differs from its value in the database.
   - Select the Field.
   - Select a value in the If Value Is field that, when met, requires a substitute value (example: M or S).
   - Enter the substitute value in the Replace With field (example: Married or Single).
   - Enter a value in the Other Values field to use when the decoded value is either null or undefined (example: Marital Status Unknown).

     Note: If a list of values exists, you must use one of its values. Otherwise, you can enter the text yourself.

6. Enter values for the following parameters if you select the **Record Calculation** data element type. As a prerequisite, you must first define the corresponding record layout and the elements in the record layout.
   - Select a calculation Function, such as Add.
   - Select the Record Name of the layout in which you are including the calculated data element.
   - Select the Format Mask.

- Select the Justification, either left or right.
- Enter a Sequence number for the first data element in the calculation.
- Select the first Data Element Name in the calculation.
- Select the remaining data elements in the calculation, entering a sequence number for each element.

7. Enter a character string in the Value field if you select the **String** data element type.
8. Enter values for the following parameters if you select the **Total** data element type:
   - Select the totaling function, either count or sum (if sum, the data element must be numeric).
   - If the function is Count, select a record but no data element.
   - If the function is Sum, select a record *and* a data element.
   - Select the Format Mask.
   - Select the Justification, either left or right.
9. Select a **Rule** to define a data element if the standard data element types do not meet your criteria. The rules are formulas created in Fast Formula.

   See: Total Compensation Formula Types, *Oracle HRMS FastFormula User Guide*
10. Save your work.

Record layout

You use the Record Layout tabbed region to define the header, sub header, detail, trailer, and sub trailer portions of your data extract.

To define the record layout of a system extract:

1. Enter a Name for the record layout definition.
2. Select the record layout Type.

   The Repeating Level field is populated based on the lowest level in the extract hierarchy from which data elements are selected for this record. This is a read-only field.
3. Enter an XML tag name if you output the system extract file in XML format.

Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.

4. Enter the Seq (sequence) number in which this data element displays in the extract report.

   Note: Sequence numbers must be unique. They must start at 1 and be between 1 and 300. It is recommended that you do not leave any gaps in your record sequence.

5. Select a data element in the Data Element Name field.

   Note: You can include a maximum of 300 elements in a record. To add more than 300 elements to a record, select the Extract Record Continuation (Links Two Records Together) element. You can only use this element for detail records. If you add this element as the last element to any record, the Extract Write Process appends the next record to the same line.

6. Enter a Start Position number for this record if you are defining a fixed layout format.

   Note: If the data element is hidden do *not* include a start position.

7. Enter a Delimiter (such as an asterisk or a comma) that separates the fields of this data element if you are defining a variable layout format.

   Note: If the data element is hidden do *not* include a delimiter

8. Check the Required field if this data element must be included in the extract record.

   Note: If a required data element is missing, the result excludes the record, which appears in the error log during the extract process.

9. To define conditions (enrollment results with a status of Void, for example) for excluding a data element from the record layout, select Advanced Conditions and follow the instructions in To define the conditions of inclusions for an extract layout, page 5-17 below.

10. Save your work.

File layout

You use the File Layout tabbed region to define the sequence in which the records in this extract display and any conditions that must exist for a record to be included in the extract.

To define the file layout of a system extract:

1. Enter a Name for the file layout definition.
2. Enter an XML tag name if you output the system extract file in XML format.

   Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.

3. Enter the Seq (sequence) number in which the extracted records display.
4. Select a record that you have defined in the Record Name field.
5. Check Prevent Duplicates to prevent the production of duplicate records for the same record and person.
6. Check Required if this record must be included in the file layout.

   Important: If a required record is missing, the extract excludes the person from its output.

7. Check Hide to hide a record from an extract file when you run the write process.

   Note: Hidden data elements appear in the extract result after you run the extract process, but are hidden when you initiate the extract write process.

8. Choose the Sort button to define a data element sort order for this file layout definition.
9. To exclude a record or group of records from the layout, select Advanced Conditions and follow the instructions in To define the conditions of inclusions for an extract layout, page 5-17 below.
10. Click Grouping to select the key data element by which to order the extract results.

If you group data elements, you must do so based on a Sub Header element.

11. Repeat steps 3-7, page 5-15 for each record in your file layout definition.

12. Save your work.

To define the sort order of the data elements in a record:

You can use the Sort window to define up to four levels of sorting for each record in a file layout. You can sort by any data element included in a record.

For extracts with multiple records, the sorting criteria defined for the record with the highest sequence number are inherited by records with lower sequence numbers unless you define a separate sort order for a record with a lower sequence number.

1. Select the record in the File Layout window for which you are defining the data element sort order.

   Note: Selecting a record limits the data elements by which you can sort to the data elements contained in that record. You can sort by a data element that you do not want to display in a record by adding that data element to the record and checking the Hide field.

2. Choose the Sort button to display the Sort window.

3. Select the primary data element by which you want to sort the record in the First Sort field.

4. Select the second data element by which you want to sort the record in the Second Sort field.

   - You can further sort the record by selecting data elements in the Third and Fourth Sort fields.

5. Save your work.

Conditions of Inclusion for File and Record Layouts

You use the Record Layout Advanced Conditions window or the File Layout Advanced Conditions window to define the conditions that must exist for a data element to be included in a record or for a record to be included in a file.

Note: Conditional inclusion is based on a text comparison of a data element value with a value you supply or with another data element. Before creating an extract, you should test your conditional inclusion criteria for accuracy on a small number of records.

To define the conditions of inclusions for an extract layout:

1. From the Layout Definition window, do one of the following:
   - Choose the Record Layout tabbed region. Enter or query a record for which you are defining conditional inclusion criteria.
   - Choose the File Layout tabbed region. Enter or query a file for which you are defining conditional inclusion criteria.
2. Choose Advanced Conditions.
3. Enter the Seq (sequence) number in which the application checks for this condition.
4. Select a Data Element Name from the list of data elements in this layout definition.
5. Select an Operator based on your conditions of inclusion for this data element.
6. Enter a Value for the data element.

   When you click into the Value field, a sample entry appears based on the operator you selected. Substitute your data element value for the sample value. For example, if you select an operator of Equals (=), enter the exact value surrounded by single quotation marks.

   Alternatively, you can select another data element from the list of values. You can compare the two elements using the operators = , <> (not equal to), > , < , >=, or <= .
7. Select a value of either And or Or if your inclusion criteria contains more than one data element value.
8. Select an Action that excludes the record based on whether the conditions of inclusion are true or false.
9. Save your work.

Defining a System Extract

You use the Define Extract window to define and maintain the definition of a system extract.

Your extract definition includes an extract criteria profile and an extract layout definition that you have already defined as well as other parameters needed for the extract batch process, such as the extract date range and the output directory and file name of the extract file.

To define a system extract:

1. Enter an Extract Name that uniquely identifies this extract definition.

2. Select the kind of data that you want to include in the extract in the Type field.

   - Choose either Full Profile, Changes Only, Compensation Workbench, or Communication.

     Note: Ensure you select the Compensation Workbench type to extract Compensation Workbench data.

3. Enter an XML tag name if you output the system extract file in XML format.

   Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.

4. Select an extract criteria profile in the Inclusion Criteria field to limit the results of the extract.

5. Select a file layout definition in the File Layout field that limits the records included in this extract to those defined in this file layout.

6. Enter the Output Directory where you want to write the results of the extract.

   System Extract validates the directory you enter against the parameter UTL_FILE_DIR set up by your database administrator. If you want to write to additional or different directories, your database administrator must update UTL_FILE_DIR with the additional paths.

7. Enter the name of the output file in the Output File Name field.

8. Select an Output Type to determine the format of the extract file. Choose from:

   - Excel Spreadsheet (HTML)
   - Flat File
   - HTML File
   - PDF File
   - RTF
   - XML File

Note: Select Flat File to generate a single text file. Select XML File to generate three files with the extensions, .xml, .xsl, and .xsd. Select PDF File if you created a PDF template in Oracle XML Publisher.

9. To enable you to view the extract results from within the Concurrent Manager View Requests window, select the Display Output File in Write Process check box.

10. Check the Append Current Request ID field if you want to add the request ID to the file name.

    In the Options tabbed region:

11. Check the Submit Write Process Automatically field if you want to write the results of this extract to a file when you run the benefits extract batch process.

    Note: If you want to review the results of your extract before writing the results to a file do not check this field. You can write the extract results to a file by running the extract write batch process from the Concurrent Manager.

12. Check the Special Handling for Dependents (ANSI 834, HIPAA) field if you are defining this extract to conform with ANSI 834 or HIPAA standards.

    Note: If you check this field, you should consider selecting the data element of Person Participation Type (ANSI) when defining the layout for this extract to distinguish participant and dependent enrollment records in the extract results.

13. Check the Update Communication Sent Date field if you are defining an extract for communications.

14. Select the name of a PDF Template you created in Oracle XML Publisher if you want to generate a PDF version of an XML extract.

15. Save your work.

Viewing Extract Change Events for a Person

You use the Change Event Log window to view the change events that have occurred to a person.

Note: You can view change events for multiple persons by running a system extract that includes change event criteria.

To view change events for a person:

1. Query the Name, Social Security number, or other standard identifying information for this person.

   The system displays the change events for this person.

2. Select a change event to view the Old and New Values for the event.

Viewing Extract Results

You use the Extract Results window to view the output of a system extract run, including summary information, detailed results by person, and run results errors.

If your security profile prevents access to certain person information, the Extract Results window hides those person records. However, summary totals display based on the entire population, regardless of your security profile.

To view the results of a system extract:

1. Query an extract result that you want to view in the Extract Name field. The system displays summary information for the extract, including:

   - The run Request ID and Run Status
   - Extract run dates and times
   - Number of records in the extract result
   - Number of records, people, and errors in the extract result
   - The extract output directory and file name

2. Select a Run Status of Approved by User if you want to approve an extract result with a status of Job Failure.

   Note: You cannot successfully run the extract write process for an extract with a status of Job Failure unless you change the run status to Approved by User. Conversely, you can change an extract with a status of Successful Completion to Rejected by User to prevent the extract write process from writing out an extract file.

3. Save your work if you changed the status of this extract run result.

4. Choose the Details button to view extract results by person.

   The system automatically queries all persons who were processed in this run. For each person, the system displays:

   - The run records that comprise the system extract definition
   - The data elements for each record
   - The value of each data element for this person

5. Choose the Sub Header and Trailer button to view records, data elements, and values for the sub header and sub trailer region of this system extract report. You can also navigate to person detail records for the sub header.

6. Choose the Header and Trailer button to view records, data elements, and values for the header and footer regions of this system extract report.

7. Choose the Errors button to view by person any errors that occurred in the system extract generation process.

   - Select an error and choose the More button to view a description of the error.

8. Correct any errors, if necessary, and re-run the system extract process or load the extract file onto the delivery medium by which it is sent to your third party benefits administrator or other outside party.

Running the System Extract Concurrent Processes

Use the Extract Process to extract records from the database for transmission to a third party, such as a carrier, payroll provider, or other benefits vendor.

Update the user profile option BEN: Max Extract Line Size to set the maximum length of a record generated by the Extract Write Process.

See: User Profiles, page 1-59

You use the Submit Requests window to run the system extract batch processes for an extract definition that you have created.

See: Benefits System Extract, page 5-3.

To run the system extract batch process:

1. Select the Extract Process in the Request Name field.

2. Select the Extract Name as the parameter for this process.

3. Enter the effective date on which you want to run the report.

4. Choose the Submit Requests button to run the report when you finish defining this batch process.

5. View the results of the Extract Process in the Extract Results window by querying the name of the extract.

   See: Viewing Extract Results, page 5-20.

   The Extract Process also produces a summary report and an error report that you can review.

6. Run the Extract Audit Report from the Concurrent Manager to view a limited selection of records from the extract results.

7. Run the Extract Write Process from the Concurrent Manager to write the results of the extract to the file you specified in your extract definition.

Restarting an Extract Process

If the Extract Process terminates for any reason, you can run the Extract Restart Process to resume extracting data records from the point where the Extract Process stopped.

You run processes from the Submit Requests window.

To restart an Extract Process:

1. Select the Extract Restart Process in the Name field.

2. Enter the Parameters field to open the Parameters window.

3. Select the Benefit Action ID number of the extract process that has stopped.

4. Choose the OK button.

5. Complete the batch process request and choose Submit.

Purging System Extract Results

When you run the Extract Process, the application writes the output to the results tables. To free table and disk space, you should periodically purge this data.

Run the Extract Results Data Purge process to delete extract results in batch mode. If you want to delete a specific extract record, you can do so from the Extract Results window.

Prior to purging extract results, confirm that you no longer need the results or that you

have written the output to a file using the Extract Write Process.

To purge a specific extract:

1. Open the Extract Results window.
2. Query the result that you want to delete.
3. Choose the Delete icon from the toolbar.
4. Confirm the deletion.
5. Save your work.

To purge extracts in batch mode:

1. Navigate to the Submit Requests window.
2. Select the Extract Results Data Purge process.
3. Open the parameters window.
4. In the Validate field, select whether to Commit or Rollback the results of the purge process.
5. Optional: select an Extract Name to purge the results of a single extract.
6. Set the effective date of the process.

   Note: The purge process deletes all extract results on or before the effective date.

7. Choose Submit.

Purging the System Extract Change Log

If you run system extracts based on change events, you should periodically purge the change event log to maintain application performance. Run the Extract Change Event Log Purge to delete data from the ben_Ext_chg_evt_log table.

You run processes from the Submit Requests window.

To purge the System Extract Change Log:

1. Select Extract Change Event Log Purge in the Name field.

2. Select Rollback in the Validate field to generate a report of data that will be purged when you run the process in Commit mode.

3. Select a person to purge the extract change log for a single user.

4. Enter a date in the On or Prior to Effective Date field to purge records based on your DateTrack date.

5. Enter a date in the On or Prior to Actual Date field to purge records based on the system date.

6. Click OK to close the Parameters window.

7. Click Submit.

Running the Extract XML Publisher Process

You can run the Extract XML Publisher process directly from the Concurrent Manager to create an output file without first processing a system extract. This is useful if you want to merge the same XML data with two or more different templates, for example, a report and a form letter. This prevents you from having to run the system extract twice, which can be time-consuming for a large extract.

You run processes from the Submit Requests window.

To run the Extract XML Publisher process:

1. Select Extract XML Publisher in the Name field.

2. Enter the Report Application ID of the template. This is the ID under which you registered the template in Oracle XML Publisher, for example, PER or PQH.

   The application filters the list of available templates based on the ID you enter.

3. Select the Template.

4. In the XML File with Path field, enter the directory path and file name of the XML extract you created.

5. In the Output File with Path field, enter the directory and file name of the PDF file you are creating.

6. Click OK to close the Parameters window.

7. Select the Output Type of the file you are generating.

   You should select an output type that corresponds to the template you created in Oracle XML Publisher.

8. Click Submit

Migrating a System Extract

You can migrate a system extract from one business group to another after you define the data elements, record layouts, file layout, and selection criteria that comprise the extract definition.

The migration process does not support seeded extract definitions. You migrate seeded extracts directly from the Extract Definition window.

> **Note:** Any extract criteria in your source extract definition must also exist in your target database. For example, if you filter extract records by a change event, you must enable the change event in the target business group. You cannot copy Advanced Criteria.

You run processes from the Submit Request window.

To migrate a system extract:

1. Select Extract Definition Download to Data File in the Name field.

   Run this process from the source business group that contains the extract definition you want to migrate.

2. In the Location and File Name field, enter a target directory path and file name.

   Your database administrator should provide you with a valid directory path. If you do not enter a path, the download process writes the file to the directory where you store your concurrent manager log files.

3. Select an Extract File Layout Name from your list of extract definitions.

4. Click OK.

5. Complete the process request and choose Submit.

To upload a system extract for migration:

1. In the Name field, select Extract Definition Upload from Data File.

   Run this process from the target business group.

2. In the Location and File Name field, enter the directory path and file name where you downloaded the extract definition.

   If you are migrating between database instances, you must physically move the downloaded data file to a directory where you can upload the file into the target

business group.

3. Select Commit or Rollback in the Validate field.

   The migration process does not update an extract that you have already migrated. Run the upload process in Rollback mode to fix errors listed in the audit log before you commit the upload.

4. Click OK.

5. Complete the process request and choose Submit.

   If you migrate an extract definition and any extract criteria in your target business group do not match the source business group, you must recreate the data in the target after you complete the upload process. You can make any other changes to your extract definition after you complete the upload.

If you encounter any errors when uploading the extract definition, verify that you:

- Set the patching level of the target database to the same level as the source database.
- Enable any Change Event codes in the target business group that you use in the source business group.
- Make available any applicable selection criteria or decoded values in the target business group.

Batch Element Entry

BEE (Batch Element Entry)

Using **BEE** is the fast way to enter batches of elements on a regular basis, or when compensation levels or policies change. For example, in each payroll period you can use BEE to:

- **Record timecard data** needed for regular pay processing, such as hours worked, location or shift worked, absences, and costing or labor distribution data
- **Enter special nonrecurring earnings or deductions** to be processed in the period
- **Enter one-time changes** to recurring earnings or deductions

From time to time, you might also use BEE for:

- **Enrollment in PTO Accrual Plans**, perhaps for a group of newly hired employees
- **Changes tosalary, bonuses, commissions**, and other types of earnings to maintain information about employee compensation

When you enter absences in a batch, BEE creates absence records as well as element entries.

Your system administrator can protect confidential assignments from unauthorized viewing and update by setting the HR: Enable Security for Batch Element Entry profile.

How To Enter a Batch

Each batch has a header and as many batch lines as you require; a batch line is one element entry for an assignment. Lines within a batch can have different effective dates. If your upload data exists in spreadsheet format, you can use the BEE Spreadsheet Interface to create your batch and submit it for validation and transfer. Alternatively, you can use one or more of these methods to create your batch:

- Enter input values and other data for one element, and run a concurrent process to create identical batch lines for all the assignments in an assignment set.
- Create an element set and make entries for each element in the set, one assignment at a time.
- Select an element and create or update lines for this element using defaults to speed entry, and changing defaults as necessary when working through the batch.

You can use any of these approaches in combination in a batch.

For example, to give an identical bonus to all full time employees in the Finance Division, you could create an assignment set for these employees and run a concurrent process to enter the bonus for the set. Then, to handle part time employees, you could select the bonus element in the Batch Lines window and create a batch line individually for each part time employee, entering a pro rata bonus amount.

Validation of Batch Entries

To validate a batch after saving it, you run the BEE validation process from the Batch Header window. This process checks the header and each line of the batch. For example, it checks that each assignment number exists in the database, and that you have specified values for all required input values. It also runs any validation formulas you have defined for the input values.

You can add your own validation procedures to the standard process. For example, you can set up control totals or extra business validation.

Control Totals

Control totals are predefined for checking the number of lines in a batch and for summing pay values and hours. You can create control totals for other numerical element input values by defining a lookup for the lookup type CONTROL_TYPE. If you need other kinds of control totals, you can define lookups for them, but you must also write a validation procedure for checking the batch against the total.

Transfer to Entries Table

When the batch is ready for transfer to the database, you run the BEE transfer process from the Batch Header window. This process first performs the same checks as the validation process. It transfers the valid element entries from the temporary tables to the Entries table in Oracle HRMS. Invalid lines are marked in error. You can correct these lines and rerun the transfer process to reprocess just these lines.

You can choose whether the transfer process automatically purges the entries from the temporary tables after transfer. You can also run a separate purge process.

You should not attempt to process concurrently batches that contain the same assignments. If an assignment exists in more than one batch that you try to process at the same time, the processes may fail due to assignment interlocks.

Rollback

After a successful BEE transfer, you can roll back the transfer process if you want to completely remove it. You can choose to roll back the transfer even if some of the entries have been processed.

You roll back the transfer from the Submit Requests window. Oracle Payroll users can also roll back processes from the Payroll Processes window, or individual batch lines from the Assignment Processes window.

Batch Statuses

The batch status depends on the status of the batch header, all the batch lines, and any control totals specified for the batch. On the Batch Header window, you can see the following status values:

ValidAll of the lines, control totals, and header are valid

Transferred All of the lines, control totals, and header have been transferred.

Transfer Incomplete The header and control totals have been transferred, along with some of the lines.

Unprocessed At least one line, control total, or the header is unprocessed, and no lines have been transferred.

Error The header has not been transferred and at least one line, control total, or the header is in error.

Status Mismatch The combination of statuses in the header, lines, and batch is not consistent. For example, it is inconsistent for the header to have the status error when some of the lines have the status Transferred.

> **Note:** A status mismatch is not possible if you always use the Batch Header and Batch Lines windows to enter and maintain a batch.

Making Batch Element Entries Using BEE

To make batch element entries using BEE, this is the overall procedure:

1. If you want to use a concurrent process to create an identical batch line for several assignments, create an assignment set.

   See: Creating an Assignment Set, *Oracle HRMS Payroll Processing Management Guide*

2. If you want to create several batch lines for each assignment, create one or more customization element sets.

   > **Note:** Each element set should contain a maximum of 20 elements since this is the limit on the number that can be viewed in the Batch Assignment Entry window (four elements on each of the five tabs).
   >
   > See: Defining an Element or Distribution Set, *Oracle HRMS Compensation and Benefits Management Guide*

3. Identify the batch, supply any external totals against which to balance it, and determine what should happen if any of the batch lines duplicate existing element entries.

See: Entering a Batch Header, page 5-30

4. Enter the batch.

   If you are using an assignment set, you enter details for one element and run a concurrent process to create identical batch lines for each assignment.

   See: Creating the Same Line for Several Assignments, page 5-33

   Then, if necessary, you can edit these line by line, using defaults to help you enter missing information.

   See: Creating or Editing Individual Batch Lines, page 5-34

   If you are using element sets, you select an assignment and element set, enter a line for each element in the set, select another assignment, repeat the process, and so on.

   See: Creating Several Lines for One Assignment, page 5-36

5. Validate the batch.

   See: Validating a BEE Batch, page 5-38

   > **Note:** If you have several batches to validate, transfer, or purge, you can process them in a single operation from the Batch Summary window. See: Processing Multiple BEE Batches Together, page 5-40.

6. Review the results, correct any lines with a status of Error, then validate again.

   See: Reviewing BEE Process Results, page 5-39

7. Transfer the batch to the HRMS Entries table.

   See: Transferring a BEE Batch, page 5-38

8. Purge the batch from the BEE tables if this was not done automatically on transfer.

   See: Purging a Batch From the BEE Tables, page 5-39

   If you have transferred a batch, but not purged it, you can roll back the transfer if you want to remove it completely from the HRMS Entries table. See: Rolling Back a BEE Process, page 5-41

Entering a Batch Header

You can enter batches of element entries in the Batch Header and Batch Lines windows. The header identifies the batch and determines what happens if any of the batch lines duplicate existing element entries.

To enter a batch header and control totals:

1. Set your effective date to the date when you want the entries to take effect.

2. Enter a name for the batch, and select a batch type. You can also enter a reference number and the source of the batch, if you require these for your own reference.

3. Select what action the process should take if one of the batch lines matches an existing element entry for an assignment at the effective date.

   - Create New Entry - The process creates a new entry if multiple entries of the element are allowed by the element definition. If multiple entries are not allowed, the process sets the status of the batch line to Error.

   - Reject Entry - The process sets the status of the batch line to Error.

   - Change Existing Entry - The process corrects or updates the existing entry. If there is more than one existing entry, the process sets the status of the batch line to Error.

   The Undefined option is display-only (for batches created using SQL*Plus or a similar tool).

4. If you selected Change Existing Entry, select the type of date effective change to be made to recurring entries:

   - Update - The process changes the existing entry from the effective date, but preserves the previous information. If there are future-dated changes to the existing entry, the process inserts the change before the next scheduled change.

   - Correct - The process corrects the existing entry from its start date through to its end date. Any future-dated changes are unaffected.

   - Override - The process changes the existing entry from the effective date, but preserves the previous information. If there are future-dated changes to the existing entry, the process replaces all future-dated changes with the batch line.

     Notice that if you select this option, you cannot check the Reject if Future Changes check box.

   The Undefined option is display-only (for batches created using SQL*Plus or a similar tool).

5. If you want to reject batch lines that match entries that start in the future or for which future changes are scheduled, check the Reject if Future Changes check box.

   Notice that if you check this box, you cannot select the Override option.

6. If you want the batch to be purged from the temporary tables after successful

transfer to Oracle HRMS, check the Purge After Transfer check box.

7. If you want to cancel a rollback process if the system detects run results for any of the batch lines, check the Reject Rollback if Results Exist check box.

   Note: The process interlock rule (which prevents you rolling back a payroll process if any further processing has taken place) does not automatically apply to BEE Rollback. If you leave this box unchecked, you can perform a rollback even if run results from payroll processing exist for any of the lines.

8. If you want rollbacks to exclude batch lines that have previously failed a rollback, check the Reject Rollback if Entry Not Found check box. If you check this box and BEE cannot roll back the element entry, the batch line retains a status of transferred. If you do not check this box, BEE attempts to roll back batch lines that have previously failed rollback, and returns an error status.

9. If you want rollbacks to include element entries updated since the last BEE operation, check the Roll Back Entry Updates check box. However, even if you check this box, the rollback always excludes overrides and corrections. If you do not check this box, you exclude from rollback all element entries updated since the last BEE operation.

10. If you want to delete the batch automatically after a rollback, check the Purge After Rollback check box.

11. If you are going to use the Assignment Lines window and you want the system to display automatically any existing lines in this batch for an assignment and element set you select, check the Auto Query box.

12. If you are going to use the Batch Lines window and you want the system to display an error if you enter an invalid assignment number, check the Auto Validation box.

Control Totals

13. If you use control totals to validate the batch before transfer, choose the Totals button

14. Select a batch control type (such as Hours, to sum all the values in the Hours input value, or Line Count, to check the number of lines in the batch).

15. Enter the control total for each control type.

    You can enter as many types and totals as you require.

Setting Up BEE Validation Using Control Totals

You can validate a BEE batch against control totals to check for missing lines or miskeying of amounts.

You can set up as many control types as you require. The following control type is predefined: _COUNT_LINES_, which checks the number of lines in a batch.

You can set up control types to sum the entries in any numerical input value, using the Application Utilities Lookups window.

To define a control type:

1. Query the lookup type CONTROL_TYPE.
2. Enter a new lookup code called _TOTAL_COLUMN_x, where x is any unique suffix you choose to identify this control type. For example, you could define a code called _TOTAL_COLUMN_BONUS.
3. Enter the meaning for this lookup code. The meaning must be the name of the input value you want to sum.

   The meaning is displayed to users when they select a control type for a batch.
4. Enter a description.
5. Save your work.

> **Important:** If your control type does not sum a numerical element input value, do not call the lookup code _TOTAL_COLUMN_x. Use another naming convention. In this case, you will need to write a procedure that validates batches against your new control type. See: Creating Control Totals for the Batch Element Entry Process, *Implementing Oracle HRMS*.

Creating the Same Line for Several Assignments

Use the Create Batch Lines window to create identical lines for all assignments identified by an assignment set. This is a quick way to create many lines for an element or an element set. If you select a single element and the input values need to vary between assignments, you can leave these blank and add them later using the Batch Lines window. If you select an element set, the batch will contain blank lines for each element. You can leave them blank to accept the default values for the input values, or you can edit individual lines in the Batch Lines window.

To enter batch lines for an assignment set:

1. Enter or query a batch header in the Batch Header window, and choose the Assignment Set button.

2. In the Create Batch Lines window, select the assignment set and payroll that identify the employees you want to create lines for.

3. If you are creating blank lines for an element set, select the set and enter an effective date for the entries. Then go to step 9.

4. If you are creating lines for a single element, select the element and enter input values as appropriate.

5. The following fields may be available depending on your localization and the element you selected:

   - Enter Further Information for this element entry.

   - For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).

6. Enter a number in the Subpriority field if you want to determine the processing sequence of multiple entries in the payroll run. Lower priority numbers process first.

7. If you selected an absence element, enter the absence start and end dates. BEE uses these dates to create an absence record, however the absence element is entered as of the effective date.

8. Change the effective date if required.

9. Choose the Process button to submit a concurrent process called Create Batches. Confirm that you want the system to create the lines.

   The Create Batch Lines window now closes, taking you back to the Batch Header window.

10. Choose the Assignment Set button again if you want to add lines for another element. Requery your batch and choose the Element Lines button if you want to view and edit the lines created by the process.

Creating or Editing Individual Batch Lines

In the Batch Lines window, you can enter new lines for individual assignments, and you can view and edit lines created automatically for an assignment set. You can speed

up entry of new lines by entering default input values

> **Note:** A batch can contain lines for as many elements as you require. Lines within a batch can have different effective dates.

To enter individual batch lines:

1. Enter or query a batch header in the Batch Header window, and choose the Element Lines button.

2. Select the element for which you want to make entries.

3. To enter default values to speed up the data entry, choose the Defaults button. The Defaults window displays the input values for the selected element.

4. Enter default values in any of the fields in the Defaults window. These defaults apply to all new entries in the batch, but not to any entries you have already made. You can change the defaults at any time during your data entry.

   > **Note:** These defaults will override any defaults defined for the element or element link. To use the element or link defaults, leave the input value blank. These defaults are entered during the BEE transfer process.

5. Uncheck the Display check box for any field that you do not want to display in the Lines window. You can hide any fields for which the default is correct for every entry.

6. In the Lines window, enter the data required for the batch. Lists of values are available on some fields, but no validation is enforced during data entry.

   > **Note:** You will not see any defaults defined for the input values, but if you leave the input values blank, the defaults are entered during the BEE transfer process.

7. The following fields may be available depending on your localization and the element you selected:

   - Enter Further Information for this element entry.

   - For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).

- Select a third party payment method in the Payee field to enter information about a third party recipient of a payment resulting from a deduction.

8. Enter a number in the Subpriority field if you want to determine the processing sequence of multiple entries in the payroll run. Lower priority numbers process first.

9. You can override the Effective Date for any line. This is the effective start date for a new entry or the effective date of an update.

10. If you selected an absence element, enter the absence start and end dates. BEE uses these dates to create an absence record, however the element is entered as of the effective date.

11. Save your entries. If you want to make entries for another element, select the element, enter new defaults, enter the lines, then save again.

Retrieving Existing Batch Lines

Use the Batch Lines window to view existing batch lines.

To retrieve existing batch lines:

1. Do one of the following:
   - Select the element in the Element field.
   - Check the Unknown Elements check box if you are querying batch lines entered for an invalid element (or no element) by SQL*Plus or another tool.

2. Choose the Find button.

Updating a Batch

You can update a batch at any time before you transfer it. If you make any changes to a batch with the status Validated or Error, the batch status changes to Unprocessed.

Creating Several Lines for One Assignment

Use the Batch Assignment Entry window for fast entry of several batch lines for one assignment. You can make one or more entries for each element in an element set.

To enter lines for one assignment:

1. Enter or query the batch header in the Batch Header window and choose the Assignment Lines button.

2. Select an assignment and element set.

3. Enter the input values for the first four elements in the set. Lists of values are available on some fields, but no validation is enforced during data entry.

   Note: You will not see any defaults defined for the input values, but if you leave the input values blank, the defaults are entered during the BEE transfer process.

4. The following fields may be available depending on your localization and the element you selected:

   - Enter Further Information for this element entry.
   - For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).
   - Select a third party payment method in the Payee field to enter information about a third party recipient of a payment resulting from a deduction.

5. Enter a number in the Subpriority field if you want to determine the processing sequence of multiple entries in the payroll run. Lower priority numbers process first.

6. You can override the effective date for any line. This is the effective start date for a new entry or the effective date of an update.

7. For absence elements, enter the absence start and end dates. BEE uses these dates to create an absence record, however the element is entered as of the effective date.

8. If there are more elements in the set, click on the next tab to display them. Continue entering input values.

9. When you have made entries to as many elements as you require from the set, save your work.

10. If you want to make entries for another assignment, select the assignment, enter the lines, then save again.

    Note: The entry values from the previous assignment are not cleared automatically from the form. So you can use the same values without retyping, you can type over the existing values, or you can use the Down Arrow key to clear the record.

Validating a BEE Batch

The validation process tests each batch line against certain predefined rules about element entries, and also against your own rules if you have created additional validation procedures.

You can also validate several batches together from the Batch Summary window. See: Processing Multiple BEE Batches Together, page 5-40.

To validate a batch:

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Validate, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.
3. When the concurrent request is completed, query the batch in the Batch Header window. If you have several batches to review, query them in the Batch Summary window.

   See: Reviewing BEE Process Results, page 5-39.

Transferring a BEE Batch

A batch exists in the temporary BEE tables only until you run the transfer process to create element entries in the Oracle HRMS Entries table.

You can also transfer several batches together from the Batch Summary window. See: Processing Multiple BEE Batches Together, page 5-40.

To transfer a batch:

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Transfer, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.
3. When the concurrent request is completed, query the batch in the Batch Header window.

   If the Batch Status is Transferred, there were no errors in the batch and the process has created the element entries. The process may have issued messages associated with the batch header, lines, or control totals.

   If the Batch Status is Error, a control total or all the batch lines have the status Error. Check the status fields in the Batch Lines window and the Control Totals window, and review the messages issued by the process.

If the Batch Status is Transfer Incomplete, the process has created element entries for some of the batch lines. The other lines have the status Error. You must correct these lines and rerun the transfer process until the Batch Status is Transferred.

Purging a Batch From the BEE Tables

If the Purge After Transfer check box on the Batch Header window is checked when you run the transfer process, the batch is deleted from the BEE tables automatically after the transfer. If the box is not checked, you can purge the batch by running a separate process.

You can purge a batch with any status.

> **Important:** You cannot roll back a batch transfer if you have purged the batch from the BEE tables.

You can also purge several batches together from the Batch Summary window. See: Processing Multiple BEE Batches Together, page 5-40.

To purge a batch:

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Purge, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.

   When the concurrent request is completed, the batch is purged.

Reviewing BEE Process Results

To review the results of a batch process, use the Batch Summary window. Oracle Payroll users can also review batch results and retry or rollback batch transfers on the Payroll Processes window.

To review batch process results:

1. Query one or more batches by name, reference, or status in the Batch Summary window.

   If a batch status is Error, at least one line, control total, or the header is in error.
2. Click on a batch to select it and choose the Errors button to identify the problem with a batch that has the status Error or Transfer Incomplete. The Messages window opens. You can view all messages or query them by type: Batch Header, Batch Line Level, or Control Total.

3. To see and correct a batch, click on it in the Batch Summary window and choose the View Batch button. The Batch Header window opens with the selected batch displayed.

4. From the header window, you can view lines, control totals, or messages:

   - To view the status of individual lines in the batch, choose the Element Lines button. In the Batch Lines window, select an element and choose Find.

     Note: If the batch status is Transfer Incomplete, you can only modify or delete the lines that are in error, or the control totals.

   - If you entered control totals for the batch, choose the Totals button on the Batch Header window to view the status for each control type.

   - To view messages for the whole batch, or all lines, or control totals, choose the Messages button. Use the option group at the top of the Messages window to control which messages are displayed.

Processing Multiple BEE Batches Together

You can use the Batch Summary window to validate, transfer, or purge several batches in a single action.

To process multiple batches:

1. Query the batches by name, status, or reference id in the Batch Summary window.

2. Use the Process check boxes to select the batches you want to process. You can use the Select All button to check all the boxes, then uncheck some as required.

   Important: Do not select multiple batches that contain the same assignments. The batches are processed at the same time, and interlock problems may arise if two processes try to process the same assignment. To avoid this, ensure your batches contain separate sets of assignments.

3. Choose the Process button and select the process you require (Transfer, Validate, or Purge) and choose Start. The system displays the concurrent request IDs for the batches so that you can query them on the Requests window.

4. When the concurrent requests are completed, the Batch Summary window displays the status of each batch and you can review any errors.

   See: Reviewing BEE Process Results, page 5-39.

Rolling Back a BEE Process

After a successful BEE transfer or partial transfer, you can roll back the transfer process if you want to completely remove it. Use the Batch Header window to specify how a rollback operates. For example, you can:

- Exclude batch lines that have previously failed a rollback.
- Include those element entries with updates since the last BEE operation.
- Purge the batch as part of the rollback process.

The process interlock rule (which prevents you rolling back a payroll process if any further processing has taken place) does not apply to BEE Rollback. You can still perform the rollback even if run results from payroll processing exist for any of the lines.

If the batch included absence entries, the rollback removes the absence records as well as the element entries.

You run the BEE Rollback process from the Submit Requests window.

> **Note:** Oracle Payroll users can also roll back a batch, or individual batch lines from the Payroll Processes window or Assignment Processes window.

To roll back a BEE process:

1. Select the batch header name of the process you want to roll back.
2. Enter Yes to cancel the rollback process if the system detects run results for any of the batch lines. Enter No if you want the system to complete the rollback even though run results exist.
3. Enter Yes to keep the batch after the rollback. Enter No to delete the batch after the rollback.

Spreadsheet Loaders

Spreadsheet Loaders: Frequently Asked Questions

This topic answers the following questions:

- What is a spreadsheet loader?, page 5-42
- When can you use spreadsheet loaders?, page 5-43
- Do spreadsheet loaders require a fixed spreadsheet template, or can you create a spreadsheet template of your own?, page 5-43
- Can you create a spreadsheet on your desktop rather than in the loader interface and then upload it to HRMS from the spreadsheet loader interface?, page 5-44
- How do you access the spreadsheet loaders?, page 5-44
- Are the spreadsheet loaders on the HRMS MIX menu available in all localizations?, page 5-44
- How do you use the BEE spreadsheet loader interface to process a BEE batch?, page 5-44
- What is the correct format for your spreadsheet? , page 5-45
- What restrictions exist?, page 5-45

What is a Spreadsheet Loader?

A spreadsheet loader is an HRMS interface that helps you to upload data more easily to Oracle HRMS. You use the spreadsheet loader interface to:

- Create a spreadsheet of the data that you want to upload.
- Make updates to the data in your spreadsheet before you upload.
- Validate your data to confirm that it is in the correct format for upload to Oracle HRMS.
- Upload your data.
- Monitor the status of the upload.
- Save the spreadsheet to your desktop so that you can perform further editing for

future uploads to Oracle HRMS.

When Can You Use Spreadsheet Loaders?

You can use spreadsheet loaders for a range of upload operations to Oracle HRMS. For example:

- For batch element entry using the Oracle HRMS > Mass Information eXchange > BEE Spreadsheet Interface menu
- For managing uploads in Oracle HRMS Data Pump using the Oracle HRMS > Mass Information eXchange > Data Pump Spreadsheet Interface menu
- For uploading legacy and third-party benefits participant and enrollment data through Configuration Workbench (Data Conversion > Benefits Conversion)
- For uploading US and Canadian tax information using Configuration Workbench (People Data > Load Employee Tax Information)
- For uploading Australian employee and tax information using Configuration Workbench (HR and Payroll > Load Reference Data)
- For first time installation of other setup data using Configuration Workbench
- For general uploads using Web ADI

Do Spreadsheet Loaders Require a Fixed Spreadsheet Template, Or Can You Create a Spreadsheet Template of Your Own?

The spreadsheet templates are fixed so that you can be sure of an exact correspondence with the Oracle HRMS tables. You cannot add or remove columns from the spreadsheet template. However, you can update the data within each column.

You can search for and access these templates from the spreadsheet loader interface. For example, US users loading employee tax information from Configuration Workbench can expect to see spreadsheets called:

- Federal Tax Information
- State Tax Information
- County Tax Information
- City Tax Information

Australian users loading employee and employee tax information from Configuration Workbench can expect to see spreadsheets called:

- Employee
- Employee Tax Information

You can always obtain the most up-to-date list from the spreadsheet interface.

Can You Create a Spreadsheet on Your Desktop Rather than in the Loader Interface, and Then Upload it to HRMS from the Spreadsheet Loader Interface?

No.

Always use the spreadsheet loader interface to create your spreadsheets. The loader interface automatically inserts macros that are essential for the success of your subsequent processing. You can then download this spreadsheet to your desktop and edit the data before re-uploading it.

How Do You Access the Spreadsheet Loaders?

Because spreadsheet loaders are a convenient method of data upload, you can access them from various points within the HRMS suite of products:

- Web ADI
- The HRMS Mass Information eXchange menu
- Configuration Workbench

Are the Spreadsheet Loaders on the HRMS MIX Menu Available in All Localizations?

BEE Spreadsheet Interface and Data Pump Interface Spreadsheet Loaders

Note that the BEE Spreadsheet Interface and the Data Pump Spreadsheet Interface are only delivered on these menus:

- Global Super HRMS Manager
- Global HRMS Manager

Batch Balance Adjustment Spreadsheet Loader

The BBA Spreadsheet Interface is delivered only with International HR and Pay, but you can add it to your Mass Information eXchange menu by adding the function PAY_SS_LOADER_BBA.

How Do You Use the BEE Spreadsheet Loader Interface to Process a BEE Batch?

Access the BEE Spreadsheet Loader Interface and then follow the on-screen instructions on how to proceed.

How Do You Perform a Batch Balance Adjustment with the BBA Spreadsheet Interface?

Access the BBA Spreadsheet Interface and then follow the on-screen instructions on how to proceed.

What is the Correct Format for Your Spreadsheet?

Use the ICX formats for number and date. Your session dates are based on the Excel format, but ideally the Excel and ICX date formats should both be DD MON YYYY (for example, 23 MAR 2005).

What Restrictions Exist?

Batch Element Entry

For batch element entry you may find that if one of the costing segments is not qualified for element entry level it will not display in the Professional forms UI even though it does display in the spreadsheet loader interface.

Batch Balance Adjustment

For batch balance adjustments, you enter a consolidation set name when you create your initial spreadsheet. However, we strongly recommend that you always re-enter the consolidation set name when you use Update Lines to update a batch. You can re-enter the consolidation set name by selecting the Consolidation Set Name from the LOV. If you do not re-enter the consolidation set name, the Update Lines feature applies a default value of '0' in place of the actual name. This default value then generates an error message when you attempt to upload your spreadsheet.

Index

A

access
  Query-Only mode, 1-132
access levels
  for lookup types, 3-59
address styles, 3-20
  adding, 3-28
  and flexfields, 3-20
  default, 3-27
  editing, 3-27
  international, 3-21
  local, 3-21
  national, 3-27
ADE
  upgrading to Web ADI, 2-18
Advanced Benefits
  links to Authoria, 3-136
Advanced Find tab, 3-169
Agreement Grades window, 3-10
alerts, 3-1
  conditions, 3-119
  configuring, 3-109
  example, 3-122
  period conditions, 3-109
  predefined, 3-109
Alerts window, 3-122
APIs, 2-7, 3-127
  usage by Web ADI, 2-5, 2-13
Application Data Exchange (ADE)
  downloading information to spreadsheets, 4-4
  upgrading to Web ADI, 2-18
Application Programmatic Interfaces, 3-2
  See APIs
Application Utilities Lookups window, 3-101
assignment-based supervisor hierarchies, 1-31
assignment-level security, 1-32, 1-34
  and organization hierarchies, 1-37
  and position hierarchies, 1-39
  and supervisor hierarchies, 1-35
  availability, 1-41
  implementing, 1-41
Assignment window, 3-9
  and task flows, 3-146
Assign Security Profile window, 1-54
attachments, using, 4-31
attributes
  Button Label, 3-155
audit groups, 1-140
  disabling, 1-141
Audit Groups window, 1-141
Audit Report, 1-142
audit reports
  custom, 1-138
  dynamic SQL structure, 1-138
  information, 1-135
  transaction types, 1-136
audit tables, 1-138
AuditTrail, 1-4
  AuditTrail Update Datetracked Tables process, 1-141
  AuditTrail Update Tables process, 1-140
  custom reports, 1-138
  disabling, 1-141
  information reports, 1-135

overview, 1-135
predefined report, 1-142
setting up audit groups, 1-140
AuditTrail:Activate profile option, 1-140
Authoria
configuring mappings, 3-137
links from HRMS, 3-129, 3-132, 3-136
sample SQL script to configure links, 3-134
AutoInstall program, 1-128

B

balance dimensions, 3-247
balances, 3-247
Bank Details key flexfield, 3-26
base currency, 3-248
Batch Assignment Entry window, 5-36
batch element entry, 5-30
BEE facility for, 5-27
Batch Header window, 5-30
Batch Lines window, 5-34
Batch Summary window, 5-39, 5-40
BEE
and existing entries, 5-31
batch statuses, 5-29, 5-36
checking control totals, 5-40
entering batch header, 5-30
entering batch lines, 5-33, 5-34, 5-36
entering control totals, 5-32
for batch element entry, 5-27
procedures for, 5-29
purging a batch, 5-39, 5-40
retrieving lines, 5-36
reviewing process results, 5-39
rollback, 5-28
rolling back a transfer, 5-41
transferring a batch, 5-38, 5-40
transfer to entries table, 5-28
updating a batch, 5-36
validating a batch, 5-38, 5-40
validation, 5-33
validation process, 5-28
branched task flows, 3-140
budget measurement types, 3-106
counting workforce, 4-19
business groups, 1-126
and users, 1-7
Button Label attribute, 3-155
button labels, 3-155
button positions, 3-156

C

CAGR
See Cost Allocation Grades key flexfield
Canada
tables, 3-43
canvas properties, 3-178
Change Candidate Access for Security Profiles process, 1-57
Change Event Log window, 5-19
checklists
defining, 3-228
items, 3-229
statuses, 3-229
Collective Agreement Grades key flexfield, 3-8
Columns window, 3-57
comments, attaching to records, 4-31
compensation and benefits, 5-2
entering, 5-1
Competence key flexfield, 3-9
concurrent managers, 4-35
concurrent programs
BIS Load Organization Hierarchy Summary Table, 4-12, 4-30, 4-30
HRI Load All Generic Hierarchy Versions, 4-18, 4-28
HRI Load All Organization Hierarchy Versions, 4-13, 4-26
HRI Load All Supervisor Hierarchies, 4-14, 4-27
HRI Load Workforce Measurement Value History, 4-16, 4-28
confirmation letters
OTA SQL*Plus script, 2-46
content
of Web ADI document, 2-7
content container, 3-132
contexts
for task flows, 3-147
in templates, 3-231
mass actions, 1-27
context-sensitive segments, 3-12
Contexts window, 1-27

conversion rate type
entering, 4-22
Cost Allocation key flexfield, 3-7, 3-10
Create Batches process, 5-34
Create Batch Lines window, 5-33
Create Descriptive Flexfield DB Items process, 3-26
Create Key Flexfield DB Items process, 3-8, 3-26
Cross Business Group Responsibility Security
See Security Groups Enabled security
currencies, 3-4
disabling, 3-248
enabling, 3-248
CustomForm, 3-3, 3-31
configuring a window with, 3-241
People Management Configurator, 3-241
restricting windows, 3-236
templates, 3-235
CUSTOM library events, 3-2, 3-125
generic, 3-125
product-specific, 3-125
Custom Report function, 4-38
parameters, 4-40
registering, 4-40
report formats, 4-39
custom security, 1-32, 1-51
user-based, 1-32
custom windows
adding, 3-242

D

data
downloading using Web ADI, 2-7, 2-20
exporting, 2-5
importing, 2-5
uploading using Web ADI, 2-8, 2-22
database items
descriptive flexfields, 3-26
in QuickPaint reports, 4-36
key flexfields, 3-26
data download
using Web ADI, 2-5, 2-9, 2-13
Data Organizer, 3-165
Data Pump
overview, 5-1
data restrictions, 3-3, 3-238
data upload
using Web ADI, 2-5, 2-10, 2-13
dates, 3-31
default menu structures, 1-128
Define QuickPaint Report window, 3-239, 4-36
Define Task Flow Nodes window, 3-35, 3-149
Define Task Flow window, 3-35, 3-149, 3-152
Denmark
tables, 3-46
descriptive flexfields, 3-2, 3-6
creating database items, 3-26
developer, 3-22
for address styles, 3-20
listing, 3-12, 3-22
Location Address, 3-20, 3-27
Personal Address Information, 3-20, 3-27
segments, 3-11
types, 3-12
user-definable, 3-11, 3-12
Descriptive Flexfield Segments window, 3-27, 3-33, 3-36
developer descriptive flexfields, 3-22
See descriptive flexfields
developer key flexfields, 3-22
Discoverer
business areas
granting access, 4-25
end user layer, 4-8
workbooks, 4-1, 4-8
Discoverer
end user layer, 4-2
Discoverer End User Layer
business areas, 4-8
Discoverer workbooks
populate with data, 4-12
document categories, 3-103
creating, 3-103
documents
categories, 3-103
creating using Web ADI, 2-20
subcategories, 3-103
types, 3-103
using Web ADI, 2-20
document subcategories, 3-103
creating, 3-103
document types, 3-103
creating, 3-103

Download HRMS Taskflows process, 3-158

E

EITs
See Extra Information Types
Element and Distribution Set window, 3-239
element classifications, 3-246
element entries, 5-2
batch, 5-27
creating batch lines, 5-33, 5-34
for an element set, 5-36
overview, 5-1
elements
batch entry of, 5-27
classifications, 3-246
element sets, 3-239
Enable Multiple Security Groups process, 1-17
events, 3-125
extending Oracle HRMS
concepts, 3-1
extensible lookups, 3-60
Extract Definition window, 5-25
Extra Information Types, 1-127, 3-2, 3-6, 3-22, 3-30
and menus, 3-31
dates, 3-31
entering, 3-39
example script, 3-33
flexfields, 3-31
in templates, 3-170
organization classifications, 3-36
Register Extra Information Types (EITs) process, 3-40
registering, 3-32
responsibilities, 3-38
sample script, 3-32
security, 3-31
setting up, 3-33

F

FastFormulas
TEMPLATE_FTE, 4-19
TEMPLATE_HEAD, 4-19
fields
additional information, 3-232
context-sensitive, 3-172, 3-231
Datetrack History, 3-232
default values in templates, 3-230
Find folder, 3-168
Find Security Profile Assignment window, 1-55
Find tab, 3-168
Find window
configuring, 3-168
Security check box, 3-169
flexfields, 3-2, 3-6
address styles, 3-20
descriptive, 3-2, 3-6
address styles, 3-20
developer, 3-22
listing, 3-12
user-definable, 3-11, 3-12
Extra Information Types, 3-2, 3-6, 3-22, 3-30
Flexfields:Open Descr Window profile option, 3-11
Flexfields:Open Key Window profile option, 3-11
in templates, 3-170, 3-227
key, 3-2, 3-6
developer, 3-22
unique identifiers, 3-7
user-definable, 3-6
Personal Analysis, 3-239
protected, 3-2
segments, 3-11, 3-27
value sets, 3-170
Flexfields:Open Descr Window profile option, 3-11
Flexfields:Open Key Window profile option, 3-11
Folders
description, 4-3
Form Customization window, 3-35, 3-241
Form Functions window, 1-132, 1-132
forms
configuring, 3-3
creating task flows, 3-148
in task flows, 3-157
task flows, 3-139
Forms Configurator
See People Management Configurator
Forms Configurator - Download Template process, 3-234
formulas
TEMPLATE_FTE, 4-21

TEMPLATE_HEAD, 4-21
France
tables, 3-46
functions, 1-127
creating, 3-233
Custom Report, 4-38
defining, 1-132
parameters, 1-132
Person Name Format, 3-249
Responsibility Ownership, 1-127
security, 1-132
function security, 1-127, 1-129, 1-132

G

Generate Secure User process, 1-17
global lookup types, 3-60
global security profiles, 1-34
Global Security Profile window, 1-47
global segments, 3-12
Grade Rate window, 1-133
granted access, 1-49
Grant Permissions to Roles process, 1-18, 1-19
groups
request, 1-5
security, 1-5

H

hierarchies
organization, 1-30
position, 1-29
supervisor, 1-29, 1-31, 1-42
Hong Kong
tables, 3-49
HR: Authoria Integration Enabled, 3-136
HR: Authoria UK URL, 3-136
HR: Authoria US URL, 3-136
HR:Business Group profile option, 1-34
HR:Cross Business Group profile option, 1-47
HR: Cross Business Group profile option, 1-9
HR: Extension Agent, 3-130, 3-136
HR: Extension Agent Enabled, 3-130, 3-136
HR: Global Competence Flex Structure profile option, 3-9
HR: Info Online: Open in New Window, 3-130, 3-136
HR: Info Online: Toolbar Icon, 3-130, 3-136
HR: Information Provider Integration Enabled, 3-130
HR:Security Profile profile option, 1-29
HR:Supervisor Hierarchy Usage profile option, 1-31
HR: Supervisor Hierarchy Usage profile option, 1-44
HR:User Type profile option, 1-127
HR ADI Seeded Integrator Form Functions menu, 2-14
HR ADI Skills Seeded Integrator Form Functions menu, 2-14
HRMS
international, 3-245
localizations, 3-245
HRMS Standard security, 1-29
HR Task Flow item type, 3-147
Hungary
tables, 3-50

I

iLearning
links from HRMS, 3-129
Info Online, 3-129
Authoria, 3-132
content container, 3-129, 3-132
information access overview, 4-1
information providers
Authoria HR, 3-131
links from HRMS, 3-129
Metalink, 3-131
RIA PCP on Checkpoint, 3-131
information types, 3-239
Information Type Security window, 3-35, 3-38
inquiry windows
list of, 4-33
integrators, 2-6
creating, 2-13, 2-33
for data upload, 2-10
for Web ADI, 2-7
integrators, controlling access to, 2-14
interface configuration, 5-2
interfaces
used by Web ADI, 2-8
internal organizations, 1-30
International HRMS, 3-245

balance dimensions, 3-247
balances, 3-247
defining a localization, 3-247
element classifications, 3-246
routes, 3-247
International HRMS Setup process, 3-246, 3-247, 3-248
Ireland
tables, 3-50
item properties, 3-180
item types
HR Task Flow, 3-147

J

Job key flexfield, 3-8

K

key flexfields, 3-2, 3-6
Bank Details, 3-26
Collective Agreement Grades, 3-8
Competence, 3-9
Cost Allocation, 3-7, 3-10
Cost Allocation Grades, 3-10
creating database items, 3-26
developer, 3-22
Grade, 3-8
Job, 3-8
People Group, 3-7, 3-9
Personal Analysis, 3-7, 3-9
Position, 3-8
setting up, 3-6
Soft Coded Legislation, 3-25
unique identifiers, 3-7
using, 3-7
knowledge integration
See Info Online

L

layouts, 2-8
creating, 2-14, 2-35
linking to template letters, 2-32
legislation rules, 3-246
legislations
See localizations
legislation-specific task flows, 3-141
letter generation, 2-1
ADE and concurrent processing compared, 2-38
confirmation letters, OTA SQL*Plus script, 2-46
linking a report with a letter, 2-54
PERWPOUK template, 2-41
PERWPWUK template, 2-44
requesting letters, 2-55
skeleton letters, 2-52
standard letter overview, 2-3
using Oracle Reports, 2-38
using SQL*Plus script, 2-49
using Web ADI, 2-10
using word processors, 2-38
writing and registering a report, 2-55
letters
mail merge, 2-53
localizations, 3-106, 3-245
creating, 3-246
defining, 3-247
local lookup types, 3-60
Location Address descriptive flexfield, 3-20, 3-27
lookups, 3-2
access levels, 3-59
defining new lookup types, 3-99
defining new lookup values, 3-100
extensible, 3-60
for security groups
removing, 3-102
global and local types, 3-60
overview, 3-59
removing lookup values, 3-101
types, 3-59
user, 3-60
user and extensible types
list, 3-60
user-defined
removing, 3-101
user types and statuses, 3-107
User Types and Statuses window, 3-106
lookup types, 3-59, 3-60
global, 3-60
local, 3-60
predefined, 3-59
lookup values
removing, 3-101

Lookup Values window, 3-36

M

mail merge, 2-3, 2-53
  using Web ADI, 2-5, 2-10, 2-29
mappings
  arguments for Authoria integration, 3-137
  between Oracle HRMS and Authoria, 3-137
  between Web ADI and Oracle HRMS, 2-8
  defining, 2-28
mass actions
  defining a context, 1-27
menu functions
  See functions
menu options
  for Web ADI, 2-11
menus, 1-126, 1-131
  and EITs, 3-31
  defining, 1-127, 1-130
  defining functions, 1-132
  for security, 1-127
  query-only access, 1-111
  structures, 1-5
  structuring, 1-129
menu structures, 1-5
  configuring, 1-127
  default, 1-128
Menu Structures report, 1-129
Menus window, 1-129, 1-130
messages
  in templates, 3-173
  predefined, 3-173
  tokens, 3-174
message tokens, 3-174
  creating, 3-176
MetaLink
  links from HRMS, 3-129
Mexico
  tables, 3-51
MIX facilities
  BEE, 5-27
models
  See security model
Multiform functionality, 1-131
multiple business groups, 1-3
multiple security groups, 1-11
multiple windows, 1-129, 1-130
  disabling, 1-131

N

national address styles, 3-27
nodes
  See task flow nodes

O

online help, 3-5
  for templates, 3-173, 3-177
Oracle HRMS
  configuring, 3-4
  extending, 3-1, 3-4
  using with spreadsheets, 4-4
Oracle HRMS Alerts, 3-109
  See alerts
ORACLE IDs, 1-26
Oracle Workflow
  See workflow
Oracle Workflow Designer, 3-147
organization classifications
  Extra Information Types, 3-36
organization hierarchies
  and assignment-level security, 1-37
  and user-based security, 1-44
  in security profiles, 1-30, 1-44
  types, 1-60
Organization Hierarchy
  collecting, 4-29
organization hierarchy types, 1-60
organizations
  classifications, 3-36
  hierarchy, 1-30
  internal, 1-30
Organization window, 3-8
OTA
  SQL*Plus script, 2-46

P

parameters, 1-132
payroll
  in security profiles, 1-30, 1-50
Payroll Backfeed, 5-1
payroll tables

row types, 3-42
People Group key flexfield, 3-7, 3-9
People Management Configurator, 3-3, 3-160
adding flexfields to a template, 3-227
adding windows to menus or task flows, 3-233
Advanced Find tab, 3-169
context-sensitive fields in templates, 3-172, 3-231
CustomForm, 3-241
Data Organizer, 3-165
editing templates, 3-224, 3-226
Find folder, 3-168
Find tab, 3-168
importing templates, 3-234
options, 3-176
previewing windows, 3-226
tabs, 3-163
task flows, 3-162
user interface, 3-162
using, 3-222
windows, 3-163
People Management templates, 3-3, 3-160
See templates
predefined, 3-166
restricting access, 3-235
People Management window, 3-161, 3-162, 3-224
fields, 3-184
period conditions for alerts, 3-109
PERSLM, 1-18, 1-56
Personal Address Information descriptive flexfield, 3-20, 3-27
Personal Analysis flexfield, 3-239
Personal Analysis key flexfield, 3-7, 3-9
Personal Profile Values window, 1-60
person-based supervisor hierarchies, 1-31
Person Name Format function, 3-249
Person Types window, 3-240
PERWPOUK
SQL*Plus script, 2-41
PERWPWUK
SQL*Plus script, 2-44
position hierarchies, 1-29
and assignment-level security, 1-39
and user-based security, 1-46
in security profiles, 1-30, 1-45
position hiring statuses, 3-106
positions, 1-30
printer drivers, 3-244
printers
drivers, 3-244
print styles, 3-244
setting up, 3-244
types, 3-244
printer types, 3-244
print styles, 3-244
Process Diagrammer, 3-157
processes
AuditTrail Update Datetracked Tables, 1-141
AuditTrail Update Tables, 1-140, 1-141
BEE Rollback, 5-41
Change Candidate Access for Security Profiles, 1-57
Create Batches, 5-34
Create Descriptive Flexfield DB Items, 3-26
Create Key Flexfield DB Items, 3-8, 3-26
Download HRMS Taskflows, 3-158
Enable Multiple Security Groups, 1-17
Forms Configurator - Download Template, 3-234
Generate Secure User, 1-17
Grant Permissions to Roles, 1-18
International HRMS Setup, 3-246, 3-248
International HRMS Setup process, 3-247
Register Extra Information Types (EITs) , 3-40
Register Extra Information Types (EITs), 3-32
security, 1-6, 1-129
Security List Maintenance, 1-17, 1-31
Update Datetracked Tables, 1-141
Upload HRMS Taskflows, 3-159
profile options, 1-22, 3-4
AuditTrail:Activate, 1-140
complete listing, 1-60
Flexfields:Open Descr Window profile option, 3-11
Flexfields:Open Key Window, 3-11
HR: Authoria Integration Enabled, 3-136
HR: Authoria UK URL, 3-136
HR: Authoria US URL , 3-136
HR:Business Group, 1-34
HR:Cross Business Group, 1-47
HR: Cross Business Group, 1-9
HR: Extension Agent, 3-130, 3-136
HR: Extension Agent Enabled, 3-130, 3-136
HR: Global Competence Flex Structure, 3-9

HR: Info Online: Open in New Window, 3-130
, 3-136
HR: Info Online: Toolbar Icon, 3-130, 3-136
HR: Information Provider Integration
Enabled, 3-130
HR:Security Profile, 1-29
HR:Supervisor Hierarchy Usage, 1-31
HR: Supervisor Hierarchy Usage, 1-44
HR:User Type, 1-127
individual assignments, 1-49
organization hierarchies, 1-49
organization hierarchy type, 1-60
person types, 1-48
server hierarchy type, 1-60
profiles
security, 1-6
user, 1-6, 1-59
protected flexfields, 3-2

Q

Query-Only mode, 1-132
QuickPaint reports, 3-239, 4-4
configuring, 4-5
defining, 4-36
running, 4-38
QuickPaint Report window
configuring, 4-5

R

records
access to, 1-29
Register Descriptive Flexfield window, 3-35
Register Extra Information Types (EITs) process,
3-32, 3-40
reporting access, 1-5
reporting users, 1-17
setting up, 1-26
reports
Audit Report, 1-142
AuditTrail Update Tables, 1-141
concurrent requests, 4-35
Custom Report function, 4-38
defining, 4-3, 4-36
Discoverer workbooks, 4-1
Menu Structure, 1-129
QuickPaint, 4-36
security, 1-129
types of, 4-1
request groups, 1-5, 1-127, 1-129
Request Groups window, 4-30
Requests window, 4-35
responsibilities, 1-5, 1-125, 1-127
and Extra Information types, 1-127
and security profiles, 1-126
and users, 1-7
defining, 1-20, 1-22
Extra Information types, 3-38
information type security, 3-35
security, 3-38
Responsibility Ownership functionality, 1-127
Responsibility window, 1-20
restrictions
defining, 3-242
include and exclude, 3-240
RIA
links from HRMS, 3-129
roles, 1-125
routes, 3-247
Rows windows, 3-57
Run QuickPaint Report window, 4-38
Russian
tables, 3-52

S

Scale Rate window, 1-133
security, 3-4
access to records, 1-29
assigning users, 1-7
assignment-level, 1-32, 1-34
AuditTrail, 1-4, 1-140
concepts, 1-5
creating Oracle IDs, 1-26
custom, 1-32
CustomForm, 3-31, 3-35
Discoverer business areas, 4-25
Discoverer workbooks, 4-25
extra information types, 1-127
Extra Information Types, 3-31
Find Security Profile Assignment window, 1-
55
functions, 1-127
global security profiles, 1-34

groups, 1-5
HRMS Standard security, 1-29
information types, 3-35, 3-38
menus, 1-127, 1-129
menu structures, 1-5
models, 1-3
multiple business groups, 1-3
multiple security groups, 1-11
organization hierarchies, 1-30
overview, 1-1
payroll, 1-30
position hierarchies, 1-30
processes, 1-6, 1-17
profile options, 3-4
profiles, 1-6, 1-29
reporting access, 1-5
reports and processes, 1-129
request groups, 1-5, 1-127
responsibilities, 1-5, 1-125
Responsibility Ownership, 1-127
rules, 1-2
Security Groups Enabled, 1-6, 1-12, 1-54, 1-125, 3-101
Security Groups Enabled security, 1-29
standard, 1-6
static lists, 1-33
supervisor, 1-31
task flows, 1-1, 3-31, 3-35
user-based, 1-32
user profiles, 1-6, 1-59
security groups, 1-5, 1-14
multiple, 1-11
Security Groups Enabled security, 1-6, 1-12, 1-14, 1-29, 1-54, 1-125, 3-101
setting up, 1-21
Security List Maintenance process, 1-18, 1-31
security models, 1-3, 1-6
security processes, 1-6
Enable Multiple Security Groups, 1-18
Generate Secure User, 1-18
Grant Permissions To Roles, 1-19
Security List Maintenance (PERSLM), 1-18
Security processes
Security List Maintenance (PERSLM), 1-56
security profiles, 1-6, 1-29
and position hierarchies, 1-45
and responsibilities, 1-126
and users, 1-7
assigning, 1-54
assignment-level security, 1-32
custom security, 1-51
defining, 1-47
ending assignments, 1-55
excluding users, 1-51
global, 1-34
granted access, 1-49
organization hierarchies, 1-30
organization hierarchy, 1-44
payroll, 1-30, 1-50
position hierarchies, 1-30
static lists, 1-33
supervisor, 1-31, 1-42
supervisor hierarchies, 1-50
user-based, 1-32
view all, 1-29
Security Profile window, 1-47
segments, 3-27
context-sensitive, 3-12
descriptive flexfield, 3-11
global, 3-12
value sets, 3-170
Self-Service Human Resources
See SSHR
sequential task flows, 3-139
server hierarchies
types, 1-60
server hierarchy types, 1-60
Singapore
tables, 3-53
SIT
See Special Information Types
skeleton letters
template letters, 2-8
Soft Coded Legislation key flexfield, 3-25
Spain
tables, 3-54
Special Information Types, 3-9, 3-31, 3-31, 3-239
in templates, 3-170
Special Information Types window, 3-9
spreadsheet loaders
frequently asked questions, 5-42
spreadsheets
creating using Web ADI, 2-20
downloading data using Web ADI, 2-9

uploading data using Web ADI, 2-10, 2-22
using Web ADI, 2-20
using with ADE, 4-4
SQL*Plus script
OTA - for confirmation letters, 2-46
PERWPOUK, 2-41
PERWPWUK, 2-44
SSHR, 1-29
Responsibility Ownership, 1-127
Standard Benefits
links to Authoria, 3-136
standard letters, 2-3
standard security, 1-6
setting up, 1-19
static lists, 1-33
styles
converting ADE styles to Web ADI, 2-19
Submit Request window, 3-158, 4-35
supervisor hierarchies, 1-29, 1-31, 1-42
and assignment-level security, 1-35
and user-based security, 1-51
assignment-based, 1-31
in security profiles, 1-31, 1-50
person-based, 1-31
supervisors, 1-31
system administration
enabling currencies, 3-248
printers, 3-244
system extract
change log, 5-19
concurrent process, 5-21
copying, 5-25
criteria, 5-5
data elements, 5-4
defining, 5-17
defining criteria, 5-8
defining the layout, 5-11
extract concurrent processes, 5-6
extract results, 5-7
extract write process, 5-7
file layout, 5-5
layout, 5-3
migration process, 5-7
overview, 5-1, 5-3
purging an extract, 5-22
purging the extract change log, 5-23
record layout, 5-5
restarting an extract, 5-22
viewing results, 5-20
XML, 5-7
XML to PDF, 5-24
System Profile Values window, 1-20, 1-60

T

tables
entering values, 3-57
for Canada, 3-43
for Denmark, 3-46
for France, 3-46
for Hong Kong, 3-49
for Hungary, 3-50
for Ireland, 3-50
for Mexico, 3-51
for Russia, 3-52
for Singapore, 3-53
for Spain, 3-54
for US, 3-54
payroll tables, 3-42
predefined, 3-43
setting up, 3-56
user-defined, 3-2, 3-42
values, 3-42
Table Structure window, 3-42, 3-43, 3-56
Table Values window, 3-57
tab page properties, 3-179
tabs
designing, 3-163
task flow nodes, 3-153
defining, 3-148
task flow processes
sub processes, 3-154
top level processes, 3-153
task flows, 3-3, 3-31, 3-139
adding to a menu, 1-133
adding windows, 3-151
amending navigation, 3-152
and workflow, 3-147, 3-153
blocks, 3-157
branched, 3-140
button labels, 3-155
buttons, 3-156
contexts, 3-147
copying, 3-151

creating
using forms, 3-148
creating a sub process, 3-154
creating a top level process, 3-153
creating using forms, 3-148
custom windows, 3-242
defining, 3-149
defining nodes, 3-148
displaying blocks, 3-157
displaying windows, 3-157
Download HRMS Taskflows process, 3-158
importing, 3-159
legislation-specific, 3-141
navigation, 3-152
nodes, 3-153
People Management Configurator, 3-162
predefined, 3-140
rules, 3-147
sequential, 3-139
structure, 3-139
top level processes, 3-153
transferring between databases, 3-141, 3-158
Upload HRMS Taskflows process, 3-159
using configured forms, 3-157
using forms, 3-139
using windows, 3-141
using workflow, 3-139
verifying and saving, 3-157
windows, 3-157
workflow
generating, 3-152
WORKFLOW_NAME parameter, 1-133
Task flows
creating using Oracle Workflow, 3-152
TEMPLATE_FTE formula, 4-21
TEMPLATE_HEAD formula, 4-21
template fields
default values, 3-165
template forms, 3-3
template letters, 2-8
linking to Web ADI layouts, 2-32
managing using Web ADI, 2-31
templates, 3-4, 3-160, 3-222
adding fields, 3-226
adding flexfields, 3-227
adding window to menu or task flow, 3-233
and the People Management Configurator, 3-4
and windows, 3-160
benefits of, 3-165
canvas properties, 3-178
configuring, 3-160
context-sensitive fields, 3-172, 3-231
copying, 3-223
custom fields, 3-161
Datetrack History, 3-232
defining checklists, 3-228
designing, 3-163
editing, 3-224
Enter Contingent Workers, 3-167
Enter Employees, 3-167
Extra Information Types, 3-170
field information, 3-232
flexfields, 3-170
Hiring Applicants, 3-167
HR Foundation, 3-168
importing, 3-234
item properties, 3-180
Maintain Contingent Workers, 3-167
Maintain Employees, 3-167
notification messages, 3-173
online help, 3-177
online help targets, 3-173
opening, 3-223
options, 3-176
People Management, 3-3, 3-162
restricting access, 3-235
People Management window, 3-184
PERWPOUK, 2-41
PERWPWUK, 2-44
predefined, 3-160
process-based windows, 3-163
properties, 3-176
removing fields, 3-226
setting field defaults, 3-230
Special Information Types, 3-170
tab page properties, 3-179
using CustomForm, 3-235
Visa Administration, 3-167
window properties, 3-177
text files
for data upload using Web ADI
format, 2-9
uploading data from
using Web ADI, 2-23

third-party information providers
  links from HRMS, 3-129
timecard data
  entering, 5-27
Top Node window, 3-154
training hours
  amending, 4-23
training time periods
  adding, 4-24
transaction types
  in audit reports, 1-136
Transcentive
  links from HRMS, 3-129
Transfer Alert Definition window, 3-122

U

UAE
  tables, 3-54
upload data
  using Web ADI
    from legacy systems, 2-23
Upload HRMS Taskflows process, 3-159
upload template letters
  for use with Web ADI, 2-31
US
  tables, 3-54
user-based security, 1-32
  and organization hierarchies, 1-44
  and position hierarchies, 1-46
  and supervisor hierarchies, 1-51
  custom, 1-32
user-definable descriptive flexfields, 3-11, 3-12
user-defined tables, 3-2, 3-42
  values, 3-42
user lookups, 3-60
user profiles, 1-6
  See profile options
  levels, 1-59
  overview, 1-59
    See also profile options
users
  and business groups, 1-7
  and responsibilities, 1-7
  and security profiles, 1-7
  creating, 1-20, 1-23
user statuses
  creating, 3-107
Users window, 1-20
user types
  creating, 3-107
User Types and Statuses window, 3-106, 3-107
  applications of, 3-106

V

validation
  BEE, 5-33
viewers
  used by Web ADI, 2-8
views
  list of, 4-33
  Web ADI usage, 2-8, 2-13

W

Web ADE styles
  converting, 2-36
Web ADI, 2-1, 2-5
  business purpose, 2-3
  configuring, 2-33
  content, 2-7
  creating integrators, 2-33
  creating mail merge letters, 2-29
  defining layouts, 2-35
  defining mappings, 2-28
  documents, 2-20
  downloading data, 2-7, 2-20
  exporting data, 2-5
  importing data, 2-5
  integrators, 2-7, 2-36
  interfaces, 2-8
  layouts, 2-8
  linking template letters and layouts, 2-32
  managing template letters, 2-31
  setting up, 2-11
  spreadsheets, 2-20
  upgrading from ADE, 2-18
  uploading data, 2-8
Web ADI integrators, 2-33
Web ADI layouts, 2-35
windows
  adding to menu, 3-233
  adding to task flows, 3-151
  adding to template, 3-233

Agreement Grades, 3-10
Alerts, 3-122
and online help, 3-5
and templates, 3-160
Application Utilities Lookups, 3-99, 3-101
Assignment, 3-9, 3-146
Assign Security Profile, 1-54
Audit Groups, 1-141
Batch Assignment Entry, 5-36
Batch Header, 5-30
Batch Lines, 5-34
Batch Summary, 5-39, 5-40
Change Event Log, 5-19
Columns, 3-57
configuring, 3-3, 3-139, 3-235, 3-236, 3-241
    data restrictions, 3-238
    with CustomForm, 3-241
context, 3-139
Contexts, 1-27
Create Batch Lines, 5-33
custom, 3-242
Define QuickPaint Report, 3-239, 4-36
Define Task Flow, 3-35, 3-149, 3-151
Define Task Flow Nodes, 3-35, 3-149
defining restrictions, 3-242
Descriptive Flexfield Segments, 3-27, 3-33, 3-36
designing, 3-163
Element and Distribution Set, 3-239
Extract Definition, 5-25
Find
    configuring, 3-168
    Security check box, 3-169
Find Security Profile Assignment, 1-55
Form Customization, 3-35, 3-241
Form Functions, 1-132, 1-132
Formula, 4-23
for task flows, 3-141
General Ledger Daily Rates, 4-23
Global Security Profile, 1-47
Grade Rate, 1-133
Information Type Security, 3-35, 3-38
inquiry
    list of, 4-33
Letter, 2-51
linking, 1-4, 3-139
    See also task flows
list of configurable windows, 3-236
Lookup Values, 3-36
Menus, 1-129, 1-130
multiple, 1-129, 1-130
    disabling, 1-131
Organization, 3-8
People Management, 3-161, 3-162, 3-224
    fields, 3-184
Personal Profile Values, 1-60
Person Types, 3-240
previewing, 3-226
process-based, 3-163
properties, 3-177
QuickPaint Report, 4-5
Register Descriptive Flexfield, 3-35
Request Groups, 4-30
Request Letter, 2-55
Requests, 4-35
Responsibility, 1-20
restricting, 3-236
Rows, 3-57
Run QuickPaint Report, 4-38
Scale Rate, 1-133
Security Profile, 1-47
Special Information Types, 3-9
Submit Request, 3-158, 4-27, 4-28, 4-35
Submit Request Set, 4-29, 4-30
System Profile Values, 1-20, 1-60
Table Structure, 3-42, 3-43, 3-56
Table Values, 3-57, 4-23
Top Node, 3-154
Transfer Alert Definition, 3-122
Users, 1-20
User Types and Statuses, 3-106, 3-107
word processors
    downloading data using Web ADI, 2-9
    supported makes for letter generation, 2-39
workflow, 3-4
    and task flows, 3-147, 3-153
    attributes, 3-147
    generating task flows, 3-152
    HR Task Flow item type, 3-147
    Oracle Workflow Designer, 3-147
    Process Diagrammer, 3-153, 3-156, 3-157
    task flows, 3-139
    verifying and saving, 3-157
workflow attributes
    See attributes

workforce
calculation, 4-19
predefined formulas, 4-19
workforce calculations
configure, 4-21
Workforce Intelligence
information access, 4-5