

**Oracle® Human Resources Management Systems**

Workforce Sourcing, Deployment, and Talent Management Guide  
(US)

Release 12

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Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide (US), Release 12

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**HRMS Glossary**

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# Send Us Your Comments

## **Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide (US), Release 12**

**Part No. B31630-03**

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
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- Does the structure of the information help you with your tasks?
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# Preface

## Intended Audience

Welcome to Release 12 of the *Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide (US)*.

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 Recruitment and Hiring**
- 2 People Management**
- 3 Talent Management**
- HRMS Glossary**

## Related Information Sources

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

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

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

### **Guides Related to All Products**

#### Oracle Applications User's Guide

This guide explains how to enter data, query 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 Officers, 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 iRecruitment 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 11i 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.



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# Recruitment and Hiring

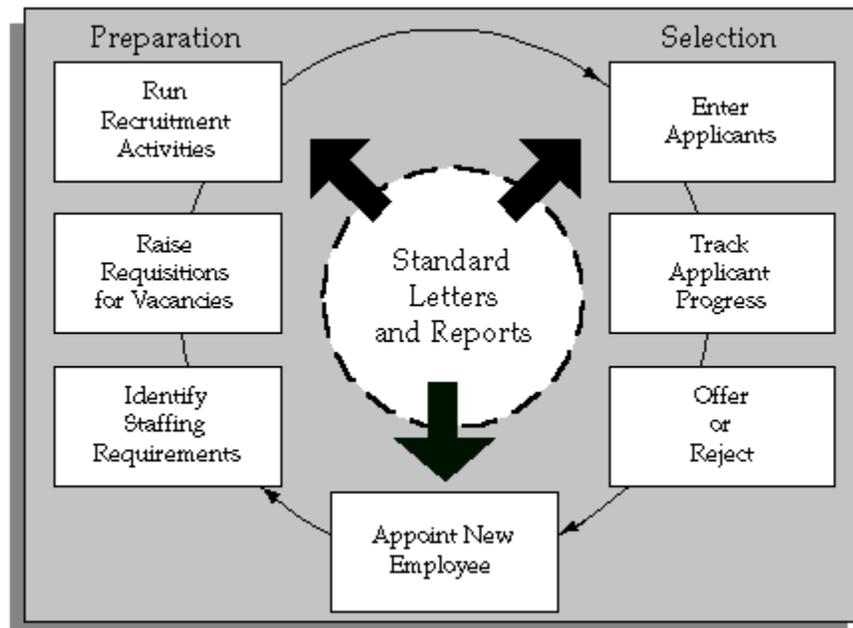
## Recruitment and Hiring Overview

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

## Oracle HRMS and the Recruitment Cycle

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

*The Recruitment Cycle*



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

Using Oracle HRMS, you can manage the three key areas of the recruitment cycle:

- **Recruitment Preparation:** Identify vacancies in your enterprise and create recruitment activities such as advertising.
- **Selection Process:** Receive and process applications and issue offer or rejection letters. You define your own stages of the selection process and track applicants' progress.
- **Appointment:** Take the applicant from the recruitment process to employee administration, where the initial tasks include entering terms and conditions and payroll information.

## Recruitment Using Oracle iRecruitment

Oracle iRecruitment is an online recruitment system that enables you to manage all the recruitment activities for your enterprise using a single self-service interface. Once your managers or recruiters have identified their staffing requirements they can enter the details of the vacancies directly into iRecruitment. Following approval, the vacancy is then posted to the enterprise's job web sites. Managers or recruiters can post the vacancy details to the third party recruitment web sites with whom you have an agreement. Your managers or recruiters can then search the entire pool of candidates to find suitable people or process those people who apply for the vacancy. Prospective candidates can use iRecruitment to register their details with your enterprise and apply for open vacancies. To access the iRecruitment functionality, you must purchase the appropriate license from Oracle. For information on licenses contact your Oracle sales representative.

See: iRecruitment Overview, *Oracle iRecruitment Implementation Guide*

## Recruitment Using Oracle Self-Service Human Resources

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

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

## Reporting on Recruitment

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

- Oracle HRMS offers the Full Applicant Details report, listing the listing the person's applications and interviews.
- Oracle iRecruitment offers the Applicant Efficiency report to show the average amount of time it takes to fill a vacancy.
- Oracle HRMSi offers the Application Termination Detail - Termination Reasons by Vacancy worksheet. This worksheet investigates the reasons your enterprise has terminated the applications. To work with Oracle HRMSi, you must purchase the appropriate license from Oracle. For information on licenses, contact your Oracle sales representative.

For more information, see: Reports and Processes in Oracle HRMS, *Oracle HRMS Window Navigation and Reports Guide*

## Key Concepts

To effectively use Oracle HRMS for recruitment management, see:

- Applications, page 1-10
- Applicant Assignments, page 1-10
- Applicant Assignment Statuses, page 1-12
- Recruitment Using People Management Templates, page 1-31

## Recruitment and Hiring

Oracle Human Resources gives you flexible control over your entire recruitment cycle, from the stage where a vacancy is first identified, through to the rejection or appointment of an applicant.

### How can you advertise your vacancies internally?

Using web-based Oracle Self-Service Human Resources (SSHR), you can give your line managers and employees an at-a-glance view of all vacancies.

### How can you manage the interview process?

You can use Oracle HRMS to both schedule your interviews and to update the

assignment status of applicants. You can also produce a report on applicants and their interview schedules.

### **How can you match applicants to vacancies?**

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

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

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

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

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

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

Using Oracle HRMS, you can convert your applicants or ex-employees to new employees with the minimum of effort.

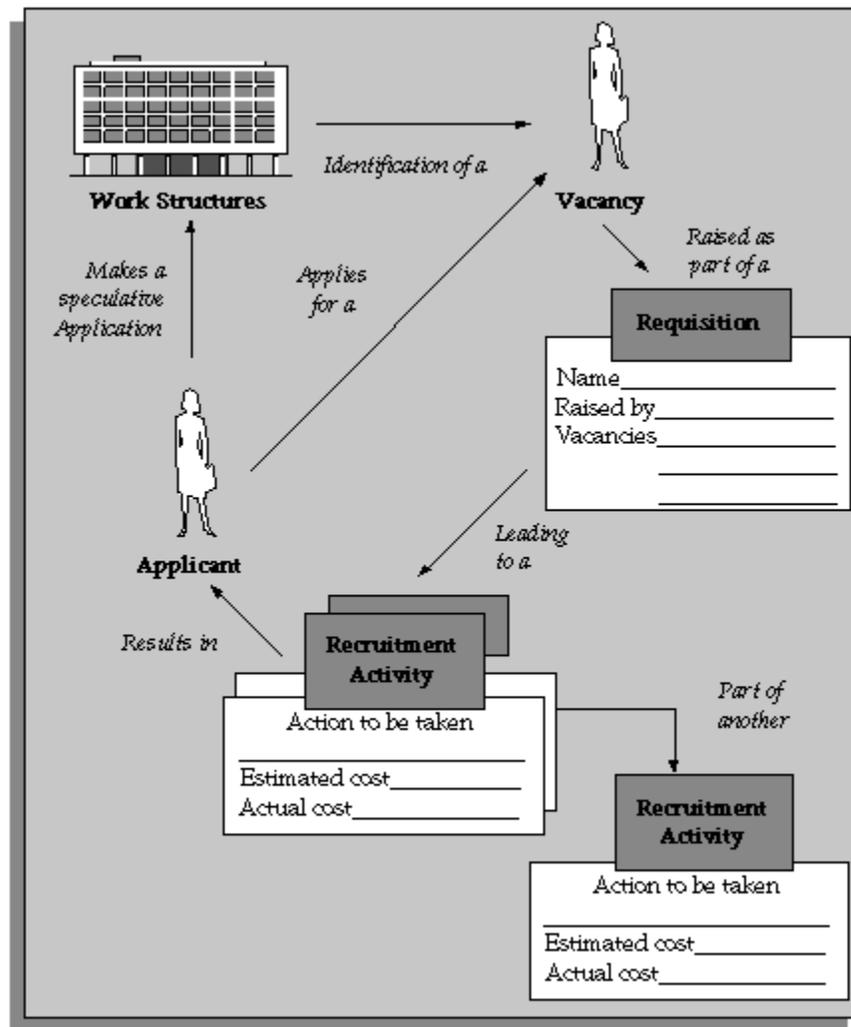
In addition, the hiring process supports a wide range of other business needs, such as back-to-back employment. It also provides you with validation. For example, you cannot rehire an ex-employee if the final process date for the previous employment is still blank. This validation ensures that the information held in the database is always correct and datetracked.

# Recruitment Preparation

## Recruitment Preparation

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

### Recruiter Preparation



## Identification of Staff Requirements

Using Oracle HRMS you can define budgets to reveal the headcount requirements within your enterprise, and then raise requisitions for the vacancies you require. You

might have prior authorization to maintain your headcount or you might need to get authorization when you identify the vacancy.

## Vacancy Requisitions

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

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

## Updating Vacancies

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

- Organization
- Job
- Grade
- People Group
- Position
- Location
- Recruiter

If you delete vacancy details without replacing them, your changes are not applied to the applicant assignment.

If you update an organization for a vacancy with an accompanying position and as a result the position becomes incompatible with the new organization, the change is still applied to the applicant assignment.

## Oracle SSHR and Vacancy Advertisements

You can now advertise vacancies internally using Oracle Self-Service Human Resources (SSHR). This self-service approach enables employees and line managers to view vacancies at-a-glance and to apply for them on the web

To enable you to advertise vacancies using self-service access, you define vacancy

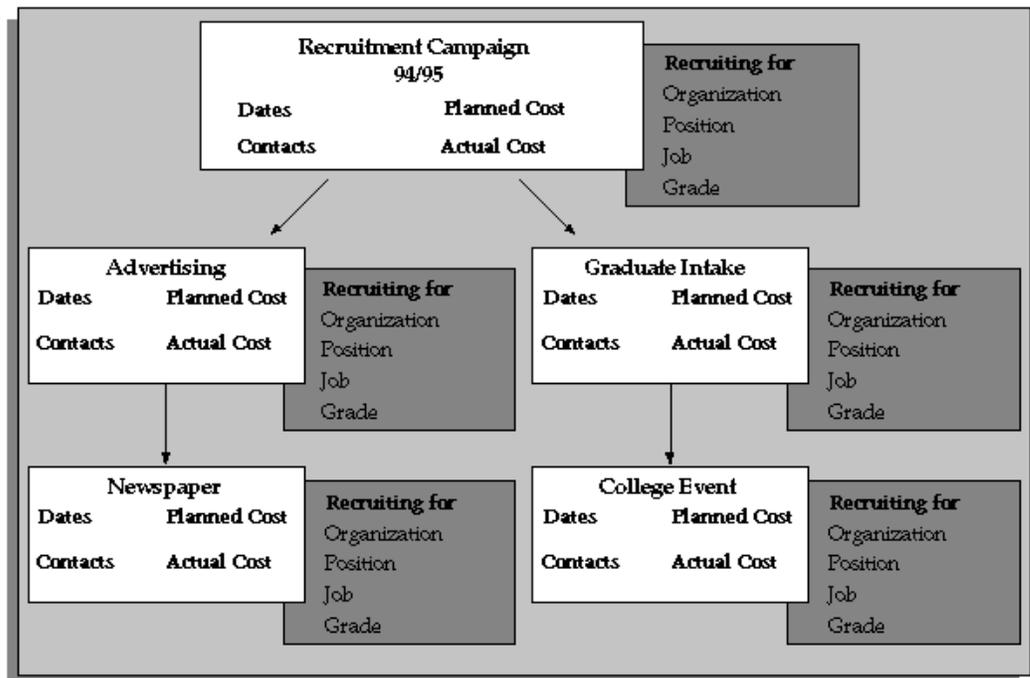
categories (Lookup Type VACANCY\_CATEGORY), then select the appropriate category while completing the Requisition and Vacancy window.

## Recruitment Activities

The authorization to recruit normally results in a specific recruitment activity, such as an advertisement. This might be part of some shared recruitment activity, such as an advertisement for more than one vacancy. The shared activity, in turn, might be part of another recruitment activity, such as a Graduate Recruitment Campaign.

Oracle Human Resources enables you to define and manage your recruitment activities.

### Recruitment Activities



## Raising a Requisition for a Vacancy

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

### To raise a requisition for a vacancy:

1. Enter the requisition and save it before beginning to define the vacancy.
2. Enter a name and number of openings for the vacancy.

3. Optionally enter a description and select a status.
4. You can select one or more assignment components to define the vacancy.
5. Optionally enter the name of the recruiter.

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

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

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

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

## Defining a Recruitment Activity

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

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

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

### To define recruitment activities:

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

## Viewing Vacancies

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

### To view vacancies:

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

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

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

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

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

# Selection Processing

## Selection Processing

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

The tasks involved in selection processing include:

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

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

## Applications and Assignments

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

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

## Additional Application Information

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

- Enter qualifications, deployment choices, and a personal competency profile for applicants. You can then perform suitability matches on these people using the

Oracle Self-Service Human Resources (SSHR) Suitability Match option.

See: Competency Profiles, page 3-29

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

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

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

See: The Special Information Approach to Skills Matching, page 3-124

## Application Entry Methods

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

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

## Back-to-Back Applications

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

## Suitability Matching

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

See: Suitability Matching, page 3-31

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

applicants.

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

## Applicant Assignment Group Updates

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

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

## Updating Vacancies

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

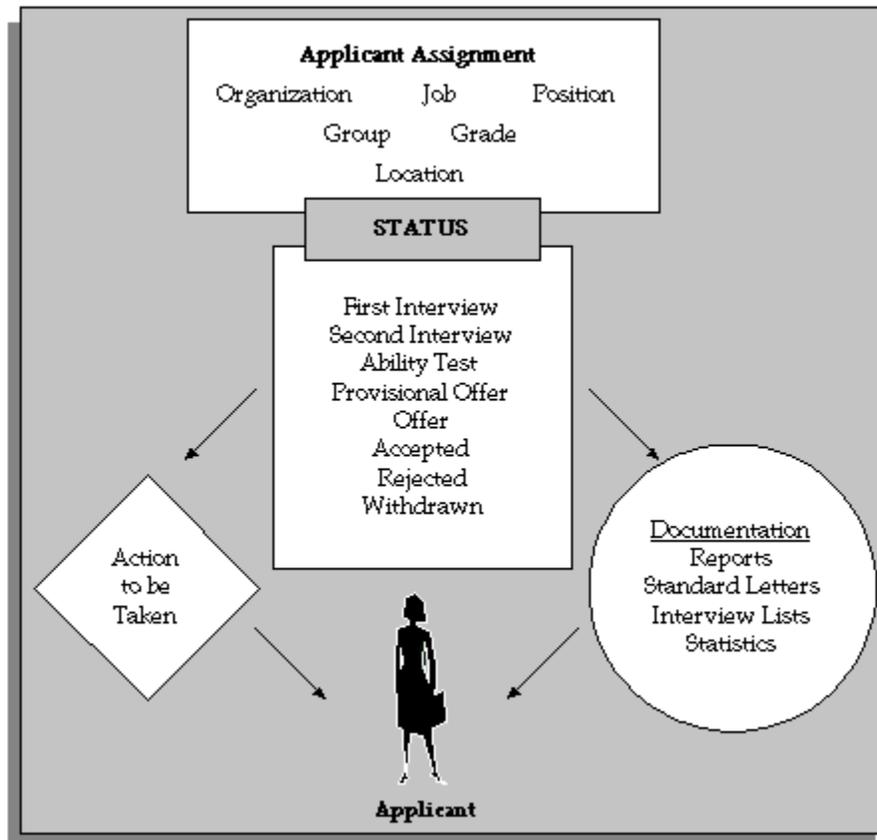
## Full Applicant Details Report

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

## Applicant Assignment Statuses

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

### The Applicant Assignment and its Status



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

- *Active Application*: This is the normal status of an application as it progresses through the selection stages.
- *Offer*: Use this status for your preferred candidate when an offer has been made.
- *Accepted*: Update the preferred candidate's assignment to Accepted status when you are ready to hire him or her in the People window.
- *First Interview*: Use this to indicate a candidate has reached the first interview.
- *Second Interview*: Use this to indicate a candidate has reached the second interview.
- *Terminate Application*. Use this status to end an applicant's assignment. You can only do this if the applicant has one or more other assignments in progress.

**Note:** The Terminate Application status is not recorded on the applicant

assignment; it causes the assignment to end.

On your system, you can give these statuses different names (called User Statuses), appropriate to your enterprise. You can define user statuses such as Applicant Received, Applicant Acknowledged for the system status Active Application.

See: Defining Assignment Statuses, page 2-103

## Primary Applicant Assignment Statuses

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

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

- Application
- Applicant Interview
- Terminate Applicant

When you change the status, you can enter a reason for the change. Define valid reasons as values for the Lookup Type APL\_ASSIGN\_REASON.

You can also change the status of a group of applicants in the Mass Update of Applicants window. For example, if you want to call 20 applicants to a selection test and to reject all other applicants for the vacancy, you can do this in the Mass Update of Applicants window.

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

## Secondary Applicant Assignment Statuses

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

See: Defining Secondary Statuses, page 2-104

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

See: Entering Secondary Assignment Statuses, page 2-117

## Interviews and Other Recruitment Events

### Interviews

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

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

See: Scheduling an Interview, page 1-18

### Recruitment Events

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

See: Event and Attendance Administration, page 3-127

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

### Applicant and Interview Reports

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

See: Running the Requisition Summary Report, page 1-22

### Application Termination

If you have rejected an applicant assignment, you can simply update its status to Terminate Application. However, an applicant must be left with one active assignment. To reject an applicant's last assignment, you must terminate the applicant. This updates their person type to Ex-applicant.

If you have entered an application in error, you can cancel the application. This action will delete all applicant assignments and will remove any reference to the person being an applicant.

See: Cancelling an Applicant Record, page 1-19

## Recording an Application Quickly

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

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

### To record an application quickly:

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

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

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

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

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

5. To enter an address, select a national address style.  
A window opens with the address format for the country you select. Enter the address lines and choose OK.
6. The Date Received defaults to your effective date, but you can change it. This is the date the applicant's record will begin.
7. You can enter the name of the applicant's current employer.
8. You can select a recruitment activity. If there is only one vacancy for the activity, the vacancy details appear automatically.
9. If you select a vacancy, applicant assignment information is displayed from the vacancy record. You can add to this information or change it. However, if you change it, the vacancy field clears.

10. If you do not select a vacancy, you can enter assignment information in the Vacancy Applied For region. If you do not enter an organization, it defaults to the Business Group.
11. Select a status for the application. By default a new application has the status Active Application (or an equivalent user status defined on your system).
12. Save your work.

If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: *Multiple Person Records*, page 2-37

## Entering Full Application Information

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

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

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

See: *Applicant Assignment Statuses*, page 1-12

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

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

### To enter an application in full:

1. Set your effective date to the date you want the applicant assignment to begin, such as the closing date for applications.
2. Enter personal information for the applicant in the People window.  
See: *Entering a New Person*, page 2-33
3. Open the Application window. If you change the Date Received, this changes the effective start date for the applicant. You can enter the date you expect to hire the new recruit.  
  
You cannot enter a Termination date in this window. You must use the Terminate Applicant window.
4. You can enter the name of the applicant's current employer.

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

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

## Scheduling an Interview

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

You perform this task using the Applicant Interview window.

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

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

### To schedule applicant interviews:

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

You can also select a location and enter times and an end date. If you select a location that has a time zone associated with it, the Timezone field displays the time zone with that location, regardless of your location.

2. If you want to associate an applicant assignment status change with the interview, enter it in the New Status field. This creates a datetracked update to the applicant assignment.

You cannot enter a status when:

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

## Canceling an Applicant Record

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

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

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

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

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

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

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

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

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

## Updating Applicant Assignments by Group

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

**To update a group of applicant assignments:**

1. Select Find from the Query menu to open the Find Applications window. Enter selection criteria for the group of applicants you want to update and choose the Find button.
2. Do one of the following:
  - If you want to update all or most of these applicant assignments, choose the Select All button. Then uncheck the Mark check box for any assignments that you do not want to update.
  - If you want to update less than half of this group of assignments, check the Mark check box for each assignment you want to update.
3. Choose the Update button.
4. In the Update window:
  - If you want to update the status of the selected assignments, select the new status.
  - If you want to refer these applicants to a new recruiter, select the name of the Recruiter.
5. Choose OK to effect the update.

## Rejecting an Application

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

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

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

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

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

See: Canceling an Applicant Record, page 1-19

### **To terminate an applicant:**

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

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

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

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

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

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

### **Canceling a Termination**

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

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

## Running the Requisition Summary Report

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

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

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

You run reports from the Submit Requests window.

### **To run the Requisition Summary Report:**

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

# Appointment

## Appointments and the Hiring Process

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

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

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

## Hire Dates and Future-Dated Changes

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

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

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

## Back-to-Back Employment and Placements

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

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

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

An ex-contingent worker starting employment or a new placement on April 1st must

have an actual termination date of March 31st for their most recent placement.

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

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

## Earliest Hire Dates

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

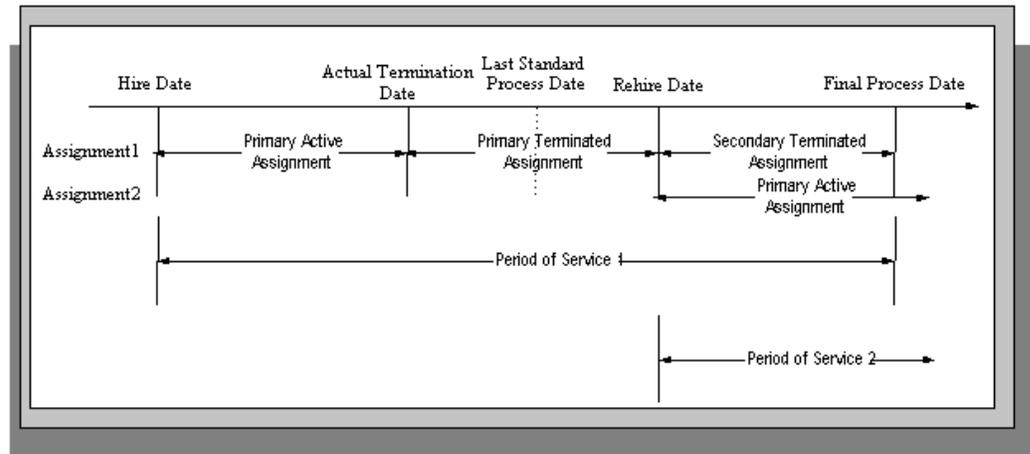
**Note:** US and Russian Payroll users can rehire ex-employee before the final process date. See: Rehire Before Final Process Date, page 1-24

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

## Rehire before Final Process Date

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

### Rehire before Final Process Date



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

**Note:** When you cancel the rehire, the application changes the secondary terminated assignment back to a primary terminated assignment. The application however retains the date changes to the primary terminated assignment even after a cancellation. For example, if the actual termination date is 20 April, the final process date is 31 April, and you rehire the person on 25 April, the application updates the primary terminated assignment for the period 21 April to 24 April and creates a new one for the period 25 April to 31 April. If you subsequently cancel the rehire, then the application retains the primary terminated assignment for the period 21 April to 24 April as well as the one for the period 25 April to 31 April.

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

## Valid Person Types for Applicants

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

## Hiring an Applicant (People Window and Application Window)

Use the Application and People windows to hire an applicant and to change the applicant's person type to Employee.

### To hire an applicant:

If you have the Application window taskflowed from the People window, as in the following procedure, then you should query the person in the People window and then navigate to the Application window from there. This saves you from having to query the person twice. If you do not, then you must first query the person in the Application window, to enable you to update the applicant assignment status, and then requery the person in the People window.

1. Query the applicant in the People window.
2. Navigate to the Application window.
3. Update the applicant assignment status to Accepted and save the change.
4. Set your effective date to the applicant's hire date.

**Note:** If future-dated changes exist, the hire date is the date of the last change plus at least one day. If no future-dated changes exist, the minimum hire date is the accepted date, plus one day.

5. Return to the People window.
6. Select a Hire Applicant in the Action Type field, and select a user person type. If only one user person type exists for the action type, it displays automatically.
  - The Latest Hire Date field displays your effective date.
  - For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.

**Note:** The Date First Hired field is on the Benefits Tab.

7. If the applicant has more than one active applicant assignments, the Active Applicant Assignments window appears. It displays all the accepted and unaccepted assignments for the applicant. You can choose to:

- Retain all accepted and unaccepted applicant assignments.
  - Convert the accepted applicant assignments to secondary assignments.
  - End date the unaccepted or other accepted applicant assignments.
  - Check the primary check box to indicate which assignment will be the primary employee assignment.
8. Save your work.
  9. **Mexico only:** Enter your new employee's previous employment details as defined by their Format 37.

See: Person Extra Information Types, page 2-18

### Updating the Assignment

If you hire an applicant with an existing primary employee assignment, you will be asked if you want to update the primary assignment.

1. If you select Yes, you will be asked: "Do you want to retain the values of the employee primary assignment for the fields that are not defined in the applicant assignment?"
  - If you answer Yes, then only fields that have values entered for them in the applicant assignment will be used to update the primary assignment. Fields that have no value entered in the applicant assignment will remain as they are in the employee assignment. For example, if you have defined Employee A as a supervisor for the employee assignment but not set up a supervisor for the application assignment, when you choose Yes Employee A will remain as the supervisor for the new employee assignment.
  - If you answer No, then all values in the applicant assignment, including the null values, will be used to update the primary assignment. For example, if you have defined Employee A as a supervisor for the employee assignment but not set up a supervisor for the application assignment, when you choose No there will be no supervisor defined for the new employee assignment.
  - If you choose Cancel, the process will be aborted.

If you choose Yes where there are future dated assignments:

- You will be warned that future dated assignments exist and that if you continue, the information in these assignments will be overwritten by the information in the new primary assignment. You can either select OK to continue, or Cancel to abort the process and review the assignment

changes.

If there are no future dated assignment changes, the primary assignment will be overwritten with the new applicant assignment details.

2. If you select No, and future dated assignments exist:

- You will be warned that if you proceed, these assignments will be deleted and replaced with the new primary assignment. You can either select OK to continue, or Cancel to abort the process and review the assignment changes.
- If you select OK, the applicant assignment is converted into the primary employee assignment, and the existing primary employee assignment is converted into a secondary assignment. Any future dated assignments will be deleted.

If you select No, and no future dated assignments exist, the primary assignment will be converted into a secondary assignment.

## Hiring an Ex-Employee or Ex-Contingent Worker

Use the People window to rehire an ex-employee or to hire an ex-contingent worker as an employee.

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

- An ex-employee can begin a new period of employment on the day following termination of their previous employment.
- An ex-contingent worker can begin employment on the day following the end of their latest placement.

See: Appointments and the Hiring Process, page 1-23

**Note:** You cannot hire an ex-employee if the final process date for the previous employment is still blank. Enter the final process date in the End Employment window.

**US and Russian Payroll Only:** You can rehire ex-employees before the final process date for their previous assignment. When you complete the rehire, the application changes the existing, terminated assignment to a secondary assignment, and the new active assignment becomes the primary. You can then process payments from both assignments during the overlapping periods of service.

See: Rehire before the Final Process Date, page 1-24

### **To rehire an ex-employee or hire an ex-contingent worker:**

1. Set your effective date to the new hire date.
2. Query the ex-employee or ex-contingent worker in the People window.
3. In the Action field, select Create Employment.
4. Select a person type. If only one person type is valid for the action, it appears automatically.
5. Save your work.
6. **Mexico only:** Specify the actual date of rehire in the Adjusted Service Date field of the People window (Benefits tab).

See: Entering Additional Personal Information (People Window), *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Mexico)*

## **Changing the Hire Date**

This procedure enables you to alter the effective date in the Hire Date field of the Application Window.

### **To change the hire date:**

1. Query the applicant if it does not already appear there.
2. Change the hire date.
  - It must be within the active period of service.
  - There must be no actual termination date or final payment date for the person.
  - It must be sometime between the last change (person type or attribute change) plus a day, and any future-dated changes (person type or attribute change) minus a day.
  - The change must not break any of the hire or rehire rules.

**Note:** Ensure that no Magnetic Tape Report request exists on the current hire date of the employee.

See: Appointments and the Hiring Process, page 1-23

3. Save your changes.

## Canceling a Hire

Follow this procedure to remove the date entered into the Hire Date field and to change the person type back to Applicant. You cancel a hire using the People window.

**Note:** You cannot cancel a hire if:

- Oracle Payroll has processed the employee in a payroll run.
  - The person's type has changed since the hire date.
  - New assignments have been created for the person after the hire date.
- The person was initially entered on the system as an employee and therefore has no previous history as an applicant or contact. In this case you must delete the person's records from the system using the Delete Person window.

See: Deleting a Person from the System, page 2-47

### To cancel a hire:

1. Query the employee in the People window.
2. Select Cancel Hire in the Action field.
3. Save your work.

The application warns you that any changes made to the person's records after their hire date will be lost. If you continue, all employee records are deleted, and the person type changes to Applicant. The applicant data history is retained.

# Recruitment Using People Management

## Recruitment Using People Management Templates

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

The template enables you to:

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

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

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

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

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

## Entering a New Applicant

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

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

1. Display the Summary window of the Hiring Applicants form.
2. Choose the New icon in the toolbar or right-click on People By Name in the Data Organizer and choose New from the right mouse menu.
3. Select New Applicant and choose OK.  
The Personal tab is displayed for you to start entering information about the applicant.
4. Set your effective date to the date when you want the applicant assignment to begin, such as the closing date for applications. You can enter a date in the Date field next to the timeline bar and choose Go.
5. Enter personal information for the applicant.
6. Choose the Communication tab if you want to enter contact information, such as addresses and phone numbers.
7. Enter application information in the All Assignments, Compensation, and Schedule tabs, as required.  
See: Entering Application Information, page 1-33.
8. Your localization team may have setup other tabs for you to complete.
9. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, page 2-37

## **Recording an Application**

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

To enter an applicant who is not yet recorded on your system, see: Entering a New Applicant, page 1-31.

**To record an application:**

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

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

For information about the fields on the Application, Compensation, and Schedule tabs, see: Entering Application Information, page 1-33.

## Entering Application Information

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

**To enter or update application information:**

1. In the Summary window, use the Data Organizer to select the application and choose Show Details.
2. If you are updating an application, set your effective date to the date the information should change.

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

## Making an Offer to an Applicant

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

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

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

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

## Changing an Applicant's Status to Accepted Offer

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

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

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

## Hiring an Applicant

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

### To hire an applicant:

1. In the Summary window, use the Data Organizer to select the person you want to hire. Use the Find window if you need to search for the person. If you want to hire the person into one specific application then select this.
2. Choose the Actions button.
3. Select one of the following actions and choose the Next button:
  - **Hire Applicant into all accepted assignments.** Select this action if you want to hire the applicant into all the applications that have been accepted, and to

delete all other applications for this person.

- **Hire Applicant into current assignment only.** Select this action if you only want to hire the person into the application you currently have selected, and to leave all other applications as they are.

4. If you have selected Hire Applicant into all accepted assignments, enter the hire date and choose Next.

A list of accepted applications is displayed.

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

- Yes. Make existing assignment secondary:

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

- Yes. Merge with existing primary assignment:

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

- Yes: Replace existing primary assignment:

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

- No. Create new secondary assignment:

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

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

## Ending an Application

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

### **To end an application:**

1. In the Summary window, use the Data Organizer to select the person whose application you want to end. Use the Find window if you need to search for the person.
2. Set your effective date to the date for ending the application.
3. Expand the person's node and select the application.
4. Choose the Actions button.
5. Select End Application and choose Next.
6. If the applicant has more than one application, go to step 8, page 1-37. Otherwise, select a new person type, such as ex-applicant and choose Next.
7. If you want to record reasons for rejecting applicants, select a reason and choose Next.
8. Choose Finish.

## Reactivating an Application

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

### **To reactivate an application:**

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

7. Choose Finish.

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

## Terminating an Applicant

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

### **To terminate an applicant:**

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

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# People Management

## People Management Overview

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

- Maintain information on all current and potential workers to track their roles and activities from the time they apply for a job to when they leave your enterprise.
- Record deployment information such as organization, job, position, and grade of the workers in your enterprise.
- Maintain details such as qualifications, competency profiles, work choices, and benefits eligibility data to manage workforce development.
- Maintain information related to ADA (Americans with Disabilities Act) and OSHA (Occupational Safety and Health Act) reporting.
- Maintain certain personal information for Equal Employment Opportunity (EEO), Affirmative Action Plan (AAP), and Veterans Employment (VETS) reporting.
- Maintain documents of record such as work visas, permits, and certificates.
- Handle mass change processes to implement changes to high volumes of information, such as employee job data, new departments, or new work relationships.

## Managing Workforce Details

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

- **Workforce Assignments:** Record the details about the different work an employee, or a contingent worker does in your enterprise and relate them to your overall work

structure.

- **Identify Workforce and Assignments:** Use unique numbers to distinguish your workers and their roles.
  - Person number: Identifies every employee, contingent worker, or applicant in your business group.
  - Assignment number: Identifies every assignment in your business group.
- **Person Types:** Record information related to different groups of people such as applicants, employees, and contingent workers, and restrict access to the different group records.
- **Assignment Statuses:** Record changes in the work status of an employee or a contingent worker with statuses such as Active, Suspended, and Terminated. For example, if an employee is on maternity leave you can assign the Suspended status. To identify different work statuses in your enterprise you can expand the predefined system statuses and set up your own multiple *user* statuses. For example, you can define the user statuses of maternity leave, paternity leave, and educational leave for the system status of Suspended.
- **New Hire Information:** Record data required by your legislation about the newly hired and rehired people.

## Managing Your Workforce

You can record details of your workforce on a daily basis using the People Management templates or the People and Assignment windows.

- **People Management Templates:** To complete tasks like entering people and hiring applicants. Your system administrator can modify these templates to create windows that are specific to your business processes.
- **People and Assignment Windows:** To enter, track, and report on people on a day to day basis. You use these windows if People Management templates are not set up in your enterprise.

## Recording Additional Information

In addition to the workforce information you enter, you can set up flexfields to capture information unique to your enterprise. For example, you can define Special Information Types to hold employee disciplinary records and Extra Information Types to record data required by your localization such as birth certificate details.

To understand the difference between Special Information Types and Extra Information

Types, see: Extra Information Types (EITs), *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Workforce Management Using Oracle Self-Service Human Resources

Oracle Self-Service Human Resources (SSHR) enables line managers, employees, and contingent workers to update their personal and professional information through interfaces personalized to their roles, work content, and information needs. Line managers can perform day-to-day HR tasks such as updating the employees' assignment details and processing transfers, promotions, and terminations. To work with Oracle SSHR, you must purchase the license from Oracle. For information on licenses contact your Oracle sales representative.

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

## Reporting on Workforce Management

Oracle HRMS and Oracle HRMSi provide a range of reports to track your workforce deployment. For example:

- Oracle HRMS offers the Terminations with Active Support Order report. This report lists employees with an active support order at the time of termination.
- Oracle HRMSi offers the Employee Separation by Reason (Organization Hierarchy) Status Analytics by Organization worksheet. This worksheet outlines the reasons for employees' separation in different organizations of your enterprise. To work with Oracle HRMSi reports you must purchase the appropriate license from Oracle. For information on licenses, contact your Oracle sales representative.

For more information, see: Reports and Processes in Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Key Concepts

To effectively use Oracle HRMS for workforce management, see:

- People in a Global Enterprise, page 2-7
- The Employee Assignment, page 2-60
- Contingent Workers, page 2-79
- Assignment Statuses, page 2-101
- Overview of Self-Service Actions, page 2-131
- Template Windows User Interface, page 2-171

## People Management

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

Using Oracle HRMS you can hold, inquire on, and track a wide range of personal information. This can include medical details, work schedules, preferred languages for correspondence, and personal contacts, as well as the basic details such as date of birth, employee number, and addresses.

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

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

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

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

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

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

### How can I update a batch of assignments together, as when a department relocates?

The Mass Assignment Update feature enables you to update assignment information for multiple employees and contingent workers in a single business group using a single update request. You can also update assignment information for multiple applicants using a single update request.

### My organization is relocating in three months; is it possible to create a future-dated assignment update?

Yes it is. The mass update to be submitted must operate at one effective date, which can be a past, present, or future date. The effective date is the date on which the change is recorded, and the date the update is submitted.

## **groups using a single responsibility?**

Yes. You can use the People Management templates to query and update worker information across business groups using a single responsibility. Oracle HRMS provides a search criterion called Business Group in addition to the existing criteria in the Find window of any people management template. This criterion enables you to search for employees belonging to one or more business groups.

When you perform a search, the Summary and Maintain windows display the business group to which the worker belongs. In addition, the key flexfields, descriptive flexfields, special information types, and extra information types display data that is appropriate to that worker's business group.

## **Can I move people automatically from one business group to another?**

Yes. Using the Global Deployments function, HR Professionals can transfer an employee either permanently or temporarily to a different business group.

At the start of the deployment, Oracle HRMS automatically creates or updates employee records in the destination business group. If the transfer is permanent, then HRMS terminates employee records in the source business group. If the transfer is temporary, then HRMS suspends the employee's current assignments. When the employee returns from a temporary deployment, HRMS automatically terminates the employee record in the destination business group and reinstates suspended assignments in the source business group.

## **What are personnel actions?**

Personnel Actions are business activities that define and document the status and conditions of employment, such as hiring, training, placement, discipline, promotion, transfer, compensation, or termination.

Personnel Actions fall into three overall types:

- Hiring
- Deployment
- Termination

Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, approving, and managing these activities.

## **In what ways does Oracle SSHR make it easier to manage personnel actions?**

You can process multiple actions on the same person concurrently, so you needn't wait for other actions to process before initiating one of your own. The application calculates a person's eligibility for you automatically. Approvers can return an action to any

previous approver for correction. Any approver on the chain with appropriate permissions can update an action, even change the effective date. You can also specify the date on which an action takes effect, or make it effective on final approval. The application gives you easy access to information about your people, the other approvers on the chain of recipients, your pending actions, and actions on your people awaiting the approval of others.

Document management features enable you to automatically generate business documents, such as a request or notification, correspondence, or a contract. "What-If" analysis enables you to see the impact of your proposed change on a person's entitlement to compensation or benefits, before submitting the change for approval. You can attach supporting documents to an action, such as a resume, certificate, photo, or web address.

### **The flexibility of allowing multiple transactions and allowing any approver to change the effective date can lead to conflicts with other pending or approved actions. How does Oracle SSHR help manage this?**

If someone makes a change to a person's record before you can approve your action, your setup can specify that the application add the updated information from the intervening change, or preserve your data. The application informs you of the status of the changes in a table that displays the original, intervening, and refreshed values.

Your setup can also specify that the application inform you when it encounters a future-dated change to the person's record. In this situation, the application routes your action to a Human Resources representative on approval, for manual entry of the changes.

### **I need to approve an absence, how do I know if another worker is available to cover the time?**

You can use the Review Resource Availability page using the HR Professional responsibility to view a worker's schedule and any calendar events that affect their time. The application searches the person's schedules and applicable calendar events within the dates you specify, and displays the results in a table.

Use the integrated features from Oracle HRMS and Oracle Common Application Components (CAC) to set up shifts, schedules, and calendar events, so you can determine the availability of your workforce.

# People

## People in a Global Enterprise

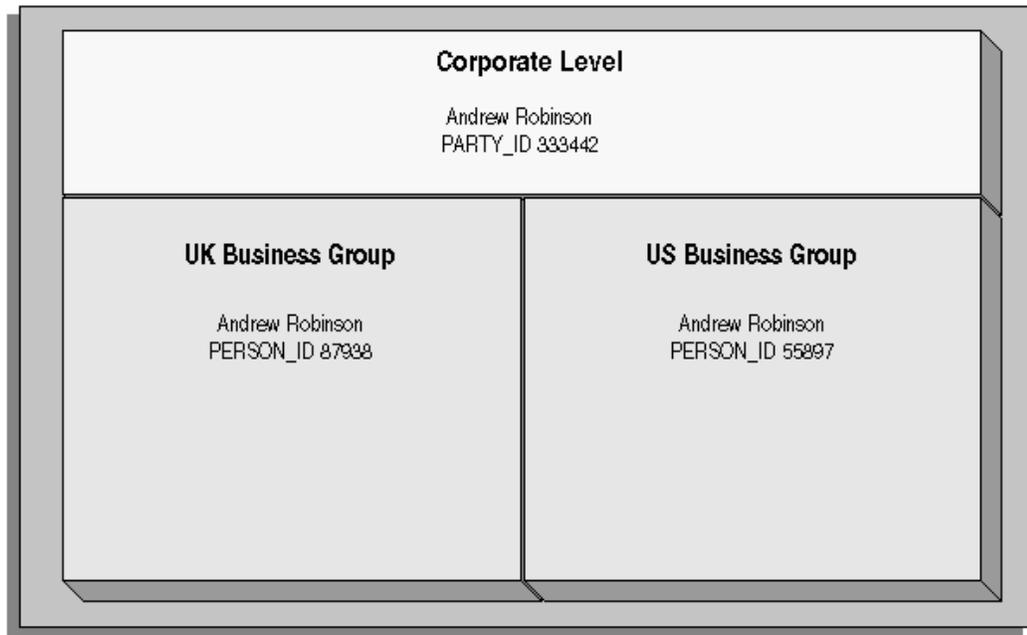
Based on a common core application for all countries, Oracle HRMS provides you with the ability to support both local and corporate requirements for global enterprises.

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

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

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

### A Multi-Organization Person Record



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

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

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

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

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

To ensure the records in the corporate and local levels are synchronized it is important that lookup types that relate to global person information contain exactly the same

lookup codes in TCA and HRMS. For example, if you add a new code to the TITLE lookup type, you must ensure the same code is added to the equivalent TCA lookup type. If the codes do not match identically then the field is cleared in TCA when an update is made in HRMS.

## Benefits of Linked Person Records

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

- Qualifications
- Establishments attended
- Competencies

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

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

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

See: Person Record Synchronization, page 2-21

## Duplicate Person Search

When creating a new person record, you can search for existing duplicate person records in a single or multiple business groups:

- Multiple business groups: This search uses the global name format (Global List Name). HRMS provides the HR: Cross BG Duplicate Person Check profile option to enable the duplicate person check functionality across multiple business groups. You must set the HR: Cross Business Groups and HR: Cross BG Duplicate Person Check profile options to Yes to display a list of potential duplicates across business groups.

For more information about the HR: Cross BG Duplicate Person Check user profile, see: *User Profiles, Oracle HRMS Configuring, Reporting, and System Administration*

## *Guide*

For information about the global name format (Global List Name), see:  
Person-Name Formats, page 2-26

- Single business group: This search uses values such as, last name, first name, date of birth, or national identifier to search for duplicate records.

## **Validating People in Multiple Business Groups**

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

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

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

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

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

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

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

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

## Transferring Employees Between Business Groups

Using the Global Deployments function, HR Professionals can transfer employees permanently or temporarily between business groups. Oracle HRMS automatically creates or updates employee records in both source and destination business groups when you initiate the transfer. Similarly, when a temporary transfer ends, Oracle HRMS automatically updates records in both business groups again.

See: Employee Transfers and Secondments, page 2-88

## Person Numbering

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

If you transfer an employee between business groups using the Global Deployments function when global employee numbering is in effect, then the transferred employee automatically retains the employee number from the source business group. In all other cases, a person who moves from one business group to another does not retain the person number from the original business group, even when global person numbering is in effect. Note, however, that you can write a formula to generate a global custom number sequence for a person type. You can handle other business needs, including the need to retain person numbers between business groups, in a person number formula.

## Person Names

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

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

See: Person-Name Formats, page 2-26

## Tracking People's Roles and Activities

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

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

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

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

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

<b>Window</b>	<b>Purpose</b>	<b>See</b>
Application	Describes the vacancy for which an applicant has applied	Applications and Assignments, page 1-10
Book Events	Records that an employee or applicant will attend an event. The event must already be defined in the Event Bookings window. If you use Oracle Learning Management, see: Introduction to Oracle Learning Management, <i>Using Oracle Learning Management</i>	Event and Attendance Administration, page 3-127
Employee Review	Schedules and records details of an employee's review or other interview type	Employee Reviews, page 3-129
Applicant Interview	Schedules and records details of an applicant's interviews	Interviews and Other Recruitment Events, page 1-15
Assignment	Records details of an employee's assignment	The Employee Assignment, <i>Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide</i>
Contract	Records details of an employee's contract	Entering Contracts, page 2-54

Window	Purpose	See
Supplementary Roles	Records details of supplementary roles a person can perform in addition to being an employee	Entering Supplementary Role Information, <i>Oracle HRMS Enterprise and Workforce Management Guide</i>

## Windows for Maintaining Personal Information

Every enterprise must be able to record personal information for its employees, applicants, and contacts. HRMS enables you to enter and update this information using windows based on templates designed for your own working environment. Your system administrator can configure the predefined templates to match your people management processes.

If the template windows are not set up at your site, you can record personal information for all person types on the People and Assignment windows.

**Note:** The template windows are an efficient way to perform most basic HR management actions, such as hiring, ending an application, and updating assignments. However, the template windows do not support all DateTrack options, so for complex retroactive changes to history, you may have to use the People and Assignment windows.

Your system administrator can set up task flows from the template windows or the People and Assignment windows to give you access to all the windows in which you can record personal and employment information. You can enter information about:

- New employees
- Employment
- Office location
- Applicants
- Background checks
- Re-hire recommendations
- Further names
- Medical details

- Address details
- Telephone numbers
- Picture record
- Dependents, beneficiaries and other contacts
- Contracts
- Supplementary role
- Elections
- Previous Employment
- Documents of Record
- Allocated Checklists

You can also use these windows to update people's statuses, for example, from applicant to employee.

**Note:** The system administrator can create configured versions of the People window and the template windows so that you use each version for certain person types only or for certain functions only (entering employees, entering applicants, or hiring applicants).

## Displaying Personal Information

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

- Use Employee Direct Access to view and update your own personal details using a web browser.
- Use Line Manager Direct Access to view information about people in your organization.
- Use the Find and Summary windows of the People Management templates to display the people who interest you, then 'drill down', by clicking on buttons, to the information you need.

If the template windows are not set up at your site, you can display the same information using the Find Person window or a People folder.

- Use an inquiry window to view specific information about a person, such as employment or absence history.

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

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

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

## Identifying Employees, Contingent Workers, and Assignments

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

- Employee number
- Contingent worker number
- Assignment number

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

See *Finding a Person Using the Find Person Window*, page 2-32 or *Finding a Person or Group of People*, page 2-177

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

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

## Employee Number

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

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

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

If you choose automatic or national identifier number generation, the employee number, by default, remains the same for an employee who has multiple periods of

service. If you choose manual number entry, you can update the number at any time.

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

## Contingent Worker Number

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

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

## Changing the Number Generation Method

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

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

## Global Person Numbering

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

**Note:** If you use the Global Deployments function to transfer an employee to a different business group when global employee numbering is in effect, then the transferred employee automatically retains the employee number from the source business group. Otherwise, a person who moves from one business group to another does not retain the person number from the source business group,

even when global person numbering is in effect.

See: Employee Transfers and Secondments, page 2-88

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

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

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

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

## The Assignment Number

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

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

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

Employee Name: Samantha Green

Employee Number 1012

1st Assignment Number 1012

2nd Assignment Number 1012-02

## Special Information Types

Basic personnel information is handled in a fairly standard way from enterprise to

enterprise. However, other types of information are recorded and used in quite different ways. Examples include training records, disciplinary records, competence, and medical records. Oracle HRMS does not restrict you to any predefined format for holding this information. You can set up your own user-defined fields for recording, analyzing, and reporting on whatever special information you require.

You set up each area of information that you want to handle separately as a Special Information Type. For example, you might define special information types for medical details and disciplinary records. You can enter a person's information under these sorts of headings in the Special Information window.

For entry of information needed for ADA and OSHA reporting, Oracle HRMS comes with the following three special information types already set up:

- **ADA Disabilities**  
See *ADA (Americans with Disabilities Act) Reporting, Oracle HRMS Enterprise and Workforce Management Guide (US)*
- **ADA Disability Accommodations**
- **OSHA-Reportable Incident.**  
See *OSHA (Occupational Safety and Health Act) Reporting, Oracle HRMS Enterprise and Workforce Management Guide (US)*

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

## Person Extra Information Types

You can define as many Extra Information Types as you require to hold information about people. There are also some predefined person EITs. These are:

### Visa

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<b>Alien Income Forecast</b>	Type of income a visa holder receives, as well as the amount and the year in which the income was received.
<b>Passport Details</b>	Information about the visa holder's passport, such as country of issue, passport number, issue date and expiry date.

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<b>Visa Details</b>	Information about the visa an employee holds, such as visa type, visa number, issue date and expiry date.
<b>Visa Payroll Details</b>	Information about the amount of income and benefit a visa holder receives.
<b>Visa Residency Details</b>	Information about a visa holder's residency, such as residency status, the residency status date, the first entry date and tax residence country.  <b>Note:</b> If this employee will be processed in a payroll with data from the Oracle Payroll interface to the International Tax Navigator from Windstar Technologies Inc., you must select WINDSTAR in the Process Type field.
<b>Visa Visit History</b>	Records a visa holder's visits to a country. The EIT stores information such as the purpose of the visit, the start and end dates of the visit, and whether the visa holder was accompanied by a spouse or children.

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If you are using the Oracle Payroll interface to the International Tax Navigator from Windstar Technologies Inc., you are required to complete the Passport Details, Visa Details, Visa Residency Details, and Visa Visit History EITs. In certain situations, you also may need to complete the Alien Income Forecast, and Visa Payroll Details EIT's.

## Tenure Tracking

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<b>Tenure Status</b>	Information about a faculty members' tenure status, such as tenure eligible, tenure denied, on tenure track, not eligible for tenure and tenured.
<b>Academic Rank</b>	Records a faculty members' academic rank, such as Lecturer, Instructor, Professor, Assistant Professor, Associate Professor.

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## Self-Service

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### Self-Service Preferences for Person

Information on a person's preferences for online documents such as the online payslip or online tax forms. The EIT determines whether the documents are available online and in a printed format.

**Note:** You can also enter this information at the location, business group, or HR organization level.

See Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

See Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

These information levels are arranged in a hierarchy; if you define self-service preferences at the person level, the settings override any other settings made at the location, business group, or HR organization level. Similarly, if you define self-service preferences at the location level, the settings override any settings at the business group or HR organization level. Settings at the HR organization level override settings at the business group level.

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## Oracle Student System

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### Oracle Student System (OSS) Person Details

Records OSS identification data for the student employee. The field Synchronize OSS Data controls synchronization of student employee address and telephone information between HRMS and OSS.

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## Person Record Synchronization

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

- Full Name
- Last Name
- Date of Birth
- First Name
- Known As
- Marital Status
- Middle Names
- Nationality
- Gender
- Title
- Blood Type
- Correspondence Language
- Honors
- Pre Name Adjunct
- Rehire Authorizer
- Rehire Recommendation
- Resume Exists
- Resume Last Updated
- Second Passport Exists
- Student Status

- Suffix
- Date of Death
- Uses Tobacco Flag
- Town of Birth
- Country of Birth
- Fast Path Employee
- Email Address
- FTE Capacity

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

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

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

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

## New Record Synchronization

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

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

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

**Person Record Table**

---

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

---

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

---

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

---

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

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

## Restrictions of Synchronization

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

### Legislative Lookups

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

### Character Sets

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

### Future Dated Changes

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

- A record for John Smith was created on 1st January 2001. At creation he was given

the marital status of Single.

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

## Maintaining Synchronization

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

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

## Automatic Transfer of Employees Between Business Groups

If you use the Global Deployments function to transfer employees automatically between business groups, then you are recommended to set HR: Propagate Data Changes to Yes at the site level. Otherwise, HRMS cannot synchronize data held for a single employee in multiple business groups during a secondment.

**Note:** Synchronizing values across business groups has implications from a legislative and legal perspective. It can also impact your benefits eligibility and enrollments set up. If you prefer not to enable automatic synchronization, use the Person Synchronization report to identify differences between records, and update records manually.

## Person-Name Formats

The Oracle HRMS person-name-formats function enables you to define person-name formats to meet enterprise requirements. HRMS provides some commonly required format definitions, which you can edit. You can also create your own format definitions for use in custom code. Each format definition, known as a *format mask*, comprises standard components of a person name, such as first name, last name, and title, in an appropriate order. A format mask can apply to a single legislation and has a *format type*.

### Format Types

HRMS identifies the following format types:

- Full Name
- Display Name
- List Name
- Order Name

#### Full Name

The Full Name format type defines the full name HRMS uses in its forms-based interface (for example, in the Find Person window).

#### Display Name

The Display Name format type is intended for use where names appear singly.

**Note:** Oracle HRMS does not currently use display names in any of its interfaces. However, you can use this format type in custom code.

#### List Name

The List Name format type is intended for use where names appear in lists. Oracle HRMS uses this format type to display person names in SSHR pages.

#### Order Name

Some legislations currently store a version of the person name, known as the order name, for use in name-ordered lists when the full name is not appropriate for list ordering. Order names are not necessary in most languages, where full name dictates list order. HRMS constructs the order name using a PL/SQL procedure. HRMS also provides an Order Name format type, so that localizations or users can replace the

supplied PL/SQL procedure if they wish.

## User-Defined Format Types

You can define additional format types for use in custom code. To create a new format type, you add its name to the lookup PER\_NAME\_FORMATS. You can then select the name when defining a new format mask.

## Stored Person Names

For performance reasons, HRMS stores person names in list-name, order-name, and full-name formats. By contrast, HRMS assembles names in display-name and user-defined formats when required.

## Local and Global Format Masks

The format mask defines the structure of the person name (its components and their order). The character set HRMS uses to store and display person names depends on whether the format is *local* or *global*.

- A local format is suitable for users in a single legislation who prefer to see person names in a character set appropriate to their legislation. For example, users in a Japanese enterprise would typically select a local format to see names displayed in a Japanese character set.
- A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

HRMS supplies both local and global versions of its Display Name and List Name format masks. (HRMS supplies only a local version of the Full Name format mask.) When you create a new format mask, you identify it as either local or global. A format mask may reference different name components depending on whether the format is local or global.

HRMS provides a profile option, HR: Local or Global Name Format, to enable users to choose between local and global representations of names.

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

## The Supplied Format Masks

HRMS supplies the following format masks:

Format Mask	Default Structure
Full Name	[Prefix] [Last Name,] [Title] [First Name] [Middle Name] [Suffix] [Preferred Name]
Local Display Name	[Known As] [Last Name]
Global Display Name	[Known As] [Last Name]
Local List Name	[Last Name] [, Known As]
Global List Name	[Last Name] [, Known As]

**Note:** The Known As component contains the name stored in the Preferred Name field, if there is one. Otherwise, Known As is a person's first name.

You can edit the supplied format masks, but you cannot delete them.

These format masks are not legislation specific. Localizations may provide legislation-specific versions of format masks, and you can also define your own. For example, you can define a List Name format mask for France or an Order Name format mask for Japan if the legislation does not supply those format masks.

## Creating or Editing Format Masks

To create a new format mask or edit the supplied format masks, you use the Person Name Formats function from the HRMS Other Definitions menu.

For a new format mask, you specify the:

- Format Type
- User Format Choice (local or global)

You can also specify a legislation value. A null legislation value means the format mask applies to all legislations.

These three values constitute the format mask's name, which must be unique in the enterprise.

The format mask itself comprises one or more name components in an appropriate order, with spaces and punctuation characters as required between components.

**Note:** Person names must not include the dollar sign (\$) or vertical bar (|) characters. Oracle HRMS uses these characters to delimit punctuation and identify tokens that represent name components in format masks.

Spaces and punctuation characters can precede or follow individual name components. For example, you could define this format:

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Row 1	First Name
Row 2	Space (Middle Name)
Row 3	Space Last Name

---

Following this example, John Smith's name is "John (Arthur) Smith". In this format mask, the first space and the parentheses belong with the Middle Name component: if the person has no middle name, the first space and the parentheses do not appear. If the person has no first name, however, the name begins with a space. Therefore, when you create or edit a format mask, consider carefully the positioning of spaces and punctuation characters in combination with optional name components.

**Note:** When you create or edit format masks, be sure to include at least one component that you are confident will never be null to avoid creating null person names.

For information about the circumstances in which HRMS uses your new or updated format mask, see *How HRMS Selects a Format Mask*, page 2-30.

## Understanding Component Names

When you create or edit a person-name format, you select name components from a list of values. The names of some of the components in this list may come from the Further Person Information developer descriptive flexfield or the Additional Personal Details descriptive flexfield and are database-column names (for example, PER\_INFORMATION1 or ATTRIBUTE1) rather than column prompts. For example, the component PER\_INFORMATION1 is the Maternal Last Name component for Mexico. To obtain the descriptive names of the name components, review the Further Person Information and Additional Personal Details flexfields for your localization. For each segment in the Segments Summary window, the value in the Window Prompt field identifies the information held in a particular component.

## Determining Whether a Localization Stores Names in Global Formats

Names in a global format are usually held in a Western character set. Whether a localization stores names in a global format is usually apparent when you create or update a person record. For example, in the Japanese localization, the People window has an English Name tab where HRMS displays a Western representation of a person's name. In the Korean localization, the Western representation of a person's name has the characters "EN" (for English) next to the name component (for example, Given (EN)).

To determine which segments of the Further Person Information developer descriptive flexfield hold the components of a global format, you can view the segments of the Further Person Information flexfield for your localization.

## Migrating Stored Names to New and Revised Formats

When you first use the person-name-formats function, and whenever you update any of the supplied format masks for stored formats (list name, order name, and full name), you must run the Update Person Names concurrent program. This program populates or updates the list-name, order-name, and full-name versions of person names in a specified legislation or in all business groups.

See: Running the Update Person Names Program, page 2-50

## How HRMS Selects a Format Mask

HRMS selects a format mask whenever you:

- Create or update a person name.
- Run the Update Person Names concurrent program.

When looking for an appropriate format mask, HRMS follows the sequence shown below for each format type. For example, for the global List Name format type, HRMS looks first for a global List Name format mask for the business group legislation. If there is no legislation-specific format mask, HRMS uses the supplied, null-legislation, global List Name format mask.

### Full Name

1. Full Name format mask for the business-group legislation
2. PL/SQL procedure (PER\_legcode\_UTILITY.PER\_legcode\_FULL\_NAME)
3. Supplied, null-legislation Full Name format mask

### **Global List Name**

1. Global List Name format mask for the business-group legislation
2. Supplied, null-legislation, global List Name format mask

### **Local List Name**

1. Local List Name format mask for the business-group legislation
2. Supplied, null-legislation, local List Name format mask

### **Global Display Name**

1. Global Display Name format mask for the business-group legislation
2. Supplied, null-legislation, global Display Name format mask

### **Local Display Name**

1. Local Display Name format mask for the business-group legislation
2. Supplied, null-legislation, local Display Name format mask

### **Order Name**

1. Order Name format mask for the business-group legislation
2. PL/SQL procedure (PER\_legcode\_UTILITY.PER\_legcode\_ORDER\_NAME)

**Note:** For Full Name and Order Name, if there is no legislation-specific format mask, HRMS looks for a PL/SQL procedure. Localizations have provided PL/SQL procedures in the past to support legislation-specific name formats. These procedures remain valid until localizations or users replace them with legislation-specific format masks.

## **Tenure Tracking**

Tenure is a unique term used primarily in the field of education that indicates the completion of professional criteria and an extended probationary period. This results in the attainment of permanent employment status with the institution.

In its most elaborate forms, Tenure constitutes recognition by the institution for worthy scholarly achievements and contributions in research, teaching, professional training, creative intellectual activities and service to the institution, community or academic

discipline.

Oracle HRMS provides you with the capability to capture data pertaining to tenure status, academic rank, competencies, qualifications, reviews, contracts and other specific information.

It is critical that you properly administer the tenure process, including capturing data, tracking and reporting key elements and events, and notifying each faculty member, and their academic manager of their status relating to tenure.

You define and enter Tenure data using the People windows.

See: Tracking Tenure, page 2-43

## Finding a Person Using the Find Person Window

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

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

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

2. Choose the Find button.

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

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

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

## Entering a New Person (People Window)

Use the People window to enter and maintain basic personal information for all person types, including employees and contingent workers.

**Note:** You can also use one of the template windows such as Entering Employees or Entering Contingent Workers to enter new people.

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

### To enter a new person:

1. Set your effective date to the appropriate date for adding the person to the application. If you are entering an employee, this should be their hire date.
2. Enter the person's name and other details in the Name region. Only the last name is required for most legislations, but some legislations require a first name too.

- In the Title field, select a title such as Mrs. or Doctor.
- You can use the Prefix field to enter the first part of the person's name, such as van der. In the case of someone whose last name is van der Zee, you can sort by the last word of the name, that is Zee. If the whole name van der Zee is entered in the Last Name field, the name is sorted under van.

**For Russian users only:** Prefix is not required in Russia, so this field is not available to Russian users.

**For UAE users only:** Prefix is recorded as additional personal information. Therefore, this field is not displayed in the Name region.

- The Suffix field holds part of the last name, such as Junior or II. You can report on the suffix separately, as required in some government-mandated reports.

**For Russian users only:** Suffix is not required in Russia, so this field is not available to Russian users.

**For UAE users only:** Suffix is recorded as additional personal information. Therefore, this field is not displayed in the Name region.

- **For Russian users only:** In the Genitive Last field, enter the genitive case of the person's last name. For example, Ivanovskogo is the genitive case of the last name Ivanovskii. The genitive last name is required for some statutory reports. If you do not enter the genitive last name, the application uses the nominative last name.

3. Select a gender, if required. In the US, you must choose Male, Female, or Unknown Gender. In the UK, you must enter the gender of each employee. For Poland, the PESEL you enter supplies the gender information.
4. In the Action field, select an action type (such as Create Employment) and a person type. The person type you select displays immediately in the Person Type for Action field before you save it. If only one user person type exists for the action type, it displays automatically in the Person Type for Action field.

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

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

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

### Entering Employee Information:

Enter the following information if the person is an employee.

1. If desired, change the Latest Start Date field.
  - The Latest Start Date field displays your effective date.
  - For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of the employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service. The Date First Hired field is situated on the Benefits Tab.

If the latest start date and the date first hired are the same, when you amend the latest start date, the date first hired is set to the same date.

If you amend the latest start date to earlier than the date first hired, the date first hired is set to the same date.

**Note:** In the US, before making a change to a latest hire date already entered for an employee, ensure that the start date of the employee's primary address is the same as or earlier than the new hire date. This preserves the integrity of the employee's tax records.

## Entering Identification Information:

Enter the person's identification information in the Identification region:

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

**Note:** If you query a person who has a combination of employee, applicant, and contingent worker numbers, the employee number displays in the Number field. If the person lacks an employee number but has a contingent worker number and an applicant number, the contingent worker number displays. However, you can choose to view any of the identification numbers held for a person by selecting them from the list.

2. Enter the national identifier for your country. For example, enter the National Insurance number in the UK, the Social Security number in the US, the Fiscal Code in Italy, the IRD Number in New Zealand, the Social Security Code (TAJ) in Hungary, the Individual Tax Payer's Number (INN) in Russia or the ID number in South Africa.

**Note:** If you are an Australian user, leave the National Identifier field blank.

## Entering Personal Details:

Enter personal details in the Personal tabbed region.

1. Enter a date of birth. You must do this before you can assign an employee to a payroll. For Poland, the PESEL supplies the date of birth.
2. Enter additional birth information into the Town of Birth, Region of Birth, and Country of Birth fields.

**For Hungarian, UAE, and Indian users only:** Enter the place of birth instead of town of birth as this information identifies employees and appears in statutory reports.

**For Belgian users only:** Region of birth information is not required in Belgium, so this field is not available to Belgian users.

3. **For Russian users only:** Enter the place of birth code in the Place of Birth field. The application uses this information when generating tax and pension statutory

reports. You can find this code in the document *All Russian Classification of Subjects of Administrative and Territorial Division (OKATO)*.

4. **For Finnish users only:** Enter the place of residence. The place of residence influences the regional membership. You use the place of residence and regional membership to calculate income tax and other statutory deductions.
5. If the Work Telephone field is displayed, enter a work telephone number. Otherwise, use the Phone Numbers window to enter this information.
6. In the Status field, select a marital status.
7. Select a nationality.  
**For UAE users only:** Nationality is recorded as additional personal information. Therefore, this field is not displayed in the Personal tabbed region.
8. **For Russian users only:** Enter the employee's statutory Pension Insurance Fund identifier. It is the employee's ID in the Statutory Pension Insurance Fund.
9. **For Russian and Swedish users only:** Select the person's citizenship. In Russia, you require this information for some statutory reporting to migration authorities. In Sweden, you can use this information to track persons who are not Swedish citizens, since the taxation and pension insurance schemes differ from those for Swedish citizens.
10. Select whether your employee, applicant or contingent worker is:
  - Registered disabled
  - Not registered disabled
  - Partially disabled
  - Fully disabled

**Note:** Whether employees are fully or partially disabled affects benefits eligibility calculations.

In the US, the Americans with Disabilities Act (ADA) Report includes employees set up as registered disabled, partially disabled, and fully disabled.

**For Finnish, Danish, and Swedish users only:** This field is not available.

11. **For Dutch users only:** Select Yes in the Work Abroad Exceeding One Year field, if your employee has worked abroad for more than a year.

12. **For Belgian users only:** enter the person's preferred correspondence language in the Other region.
13. Save your work.

### **Multiple Person Records:**

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

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

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

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

Do one of the following four tasks:

- If the person you are entering already exists, but in a different business group, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. If your application has person synchronization enabled, then the personal information entered for the new person is copied across to existing records in other business groups. If existing records have values for fields that the new record leaves blank, then these values appear in the new record. See: Person Record Synchronization, page 2-21
- If the person already exists in your current business group then select that person from the list of values. The application retrieves the existing record and cancels the save you were trying to make, as one business group cannot contain two records for the same person. Close the new record and scroll down to display the existing record.

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

- If the person already exists in TCA, but not in HRMS, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the

same person. The information held for the person in TCA is updated with that entered in HRMS. See: *People in a Global Enterprise*, page 2-7

- If the person you are entering does not match any of the records displayed, then select No Match in the lookup. Your new person record is saved.

### **What Next?:**

Optionally, you can enter additional information for people in the tabbed regions.

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

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

You can enter additional information for people in the tabbed regions of the People window as described in the following steps.

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

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

1. Choose the Employment tabbed region.
2. Select an ethnic origin. For accurate EEO-1, EO Survey, and AAP reporting, you must select an ethnic origin for employees. The list includes the seven ethnic origin categories required for the EO Survey Report. When you run other reports that include ethnic origin data, Oracle HRMS automatically consolidates the data into groups appropriate to the report.

See: *Data for EEO-1 Reporting, Oracle HRMS Enterprise and Workforce Management Guide*

3. Indicate if this employee has chosen to disclose their ethnicity.  
If the employee declines to specify their ethnicity, choose an approximate ethnicity for them.

4. Select the person's veteran status to include them in the VETS-100 reports.

See: *VETS-100 (Federal Contractor Veterans Employment) Reporting, Oracle HRMS*

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

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

7. Enter an I-9 Expiration Date if the employee's eligibility to work in the US ends at a certain date, given in his or her documents.
8. To enter data for the New Hire report:

- The New Hire Status field defaults to Include in New Hire Report, so that the next run of the New Hire report for the employee's GRE will include this employee.
- If the New Hire report should not cover this employee, select Exclude from New Hire Reporting. Optionally, select a reason for this exclusion in the Exception Reason field.

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

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

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

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

See: *New Hire Reporting*, page 2-194

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

1. Choose the Office Details tabbed region.

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

**To enter information for an applicant:**

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

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

1. Choose the Background tabbed region.
2. Check whether the employee's background check has been performed.
3. Select the date the background check was performed.

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

1. Choose the Rehire tabbed region.
2. Check whether the former manager has recommended the applicant for rehire.
3. Select the reason for this recommendation.

**To enter further name information:**

1. Choose the Further Name tabbed region.
2. Enter one or more honors/degrees (BA, MBA or JD, for example) that the person has earned.
3. Enter the name (perhaps a nickname) by which the person prefers to be known.

4. If the person previously known by a different name, enter the previous last name.

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

1. Choose the Medical tabbed region.
2. Select the person's blood type.  
You cannot change this value once you enter it.
3. Select the date of this employee's last medical test.
4. Enter the name of the physician who performed this test.

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

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

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

6. If the person has died, enter the date of death.  
If you enter the termination reason of deceased and the actual termination date on the Terminate window and date of death has not been entered, it is set to the employee's termination date.
7. Check the Military Service check box if the person is employed in military service in some capacity.  
The value of this field can impact benefits calculations.
8. Check the Second Passport Exists check box if the person possesses multiple

passports.

**To enter benefits information:**

1. Choose the Benefits tabbed region.
2. Enter a benefit group for your employee or applicant. Benefit groups are used to determine a person's eligibility for a plan or for setting benefit rates. For example, benefit groups can be used for mergers and acquisitions where eligibility is complicated. They can also be used where a person is grand-fathered into a very old plan.
3. Enter what kind of tobacco your employee uses, if any. For example, cigarettes, pipe, cigar or chewing. This is used within benefits to determine the eligibility and rates for particular plans.
4. Enter medical plan number. This is the policy or group plan number of an externally provided medical plan. This is used to determine eligibility to participate in some plans.
5. Enter the adoption date, if the person has adopted a child. This information, with the date of birth, is used to determine whether a dependant is covered by a plan. You can only enter the adoption date if you have entered a date of birth for the person. The adoption date must be greater or equal to the date of birth.
6. Enter the date you received the death certificate, if your employee has died. You can only enter this once you have entered the date of death in the Other Information fields. The receipt of the death certificate must be after or equal to the date of death.
7. Enter an adjusted service date for your employee. This date is used within benefits, in place of the date first hired, to determine the length of service for eligibility, enrollment and rates. The adjusted service date may be used to credit service for former employers, grand-fathered benefits or in the case of mergers and acquisitions.
8. Change the date first hired for your employee. For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.
9. Check the Other Coverage checkbox, if your employee or applicant has externally provided coverage. This determines a person eligibility for certain plans.
10. Check the Voluntary Service checkbox, if your employee or applicant is volunteering, for example as a missionary. This determines eligibility to continue or receive coverage from certain plans.

## Tracking Tenure

Using Oracle HRMS, you can capture and track Tenure information. You can also generate reports to be used for notification, assessment, review and reporting purposes.

The set up for Tenure is accomplished by accessing several different windows. You will be entering information pertaining to tenure status, academic level, accomplishments and milestones, contracts, competency types and levels, events and reviews.

### To set up Tenure data using the People window:

1. Choose the Others button and select Extra Information to record Tenure Status and Academic Rank.

See: Entering Extra Information for Tenure Tracking, page 2-44.

2. Choose the Others button and select Competence Profile to record competency types and levels.

See: Creating a Competence Profile, page 3-32

3. Choose the Others button and select Qualifications to record accomplishments and milestones.

See: Entering Qualifications, page 3-83

4. Choose the Others button and select Contract to record the length and types of contracts under which the tenure faculty member serves.

See: Entering Contracts, page 2-54

5. Choose the Assignments button, then the Others button and select Reviews to record student evaluations, performance reviews, or peer reviews.

See: Entering an Employee Review, page 3-129

### To enter upcoming Tenure events:

1. Select Events and Bookings from the People menu.

**Note:** All Tenure event types should begin with the word Tenure.

See: Creating an Event, page 3-129

### To process Tenure reports and notifications:

1. Select Processes and Reports to make a request.

See: Tenure Notifications, page 2-216

See: Tenure Reports, page 2-217

## Entering Extra Information for Tenure Tracking

For Tenure tracking purposes, you should enter the following extra using Extra Information:

- Academic Rank
- Tenure Status

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.

### **To access Extra Person Information from the People window:**

1. Choose the Others button.
2. Select Extra Information.

### **To enter Academic Rank :**

1. Select Academic Rank from extra person information.
2. Click in the Details field to display the extra information fields you can enter.
3. Select your current Academic Rank from the list of values.
4. Enter the start and end dates.
5. Select Next Academic Rank from the list of values.
6. Enter the Projected Date.
7. Save your Academic Rank extra information.

### **To enter Tenure Status :**

1. Select Tenure Status from extra person information.
2. Click in the Details field to display the extra information fields you can enter.
3. Select your current Tenure Status from the list of values.
4. Enter the Date Determined and Projected Tenure dates.
5. Enter the Adjusted Tenure Date and Reason for Adjustment if applicable.

6. Select Subject to Tenure Quota from the list of values.
7. Save your Tenure Status extra information.

## Entering Pictures

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

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

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

You enter pictures in Oracle HRMS in the Picture page.

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

1. In the Picture page, enter the file path or click Browse to locate the directory in which you saved the graphic file
2. Highlight the filename and click Open. The selected file is loaded and displayed in the Picture page.

## Entering and Maintaining Documents of Record

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

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

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

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

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

### **To search for documents of record:**

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

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

3. Click Go to perform the search.

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

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

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

See: Finding a Person Using the Find Person Window, page 2-32

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

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

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

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

3. Alternatively, to create a new document, click Create Document of Record.  
The Create Document of Record page appears.  
See: Documents of Record, *Oracle HRMS Deploy Self-Service Capability Guide*
4. Complete the Create Document of Record page or update the document information, and click Apply.
5. Close the window.

## Running the Person Synchronization Report

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

Run the Person Synchronization report in the Submit Requests window.

### To run the Person Synchronization report:

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

## Deleting a Person from the System (People and Delete Person Windows)

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

If you want to remove all records of a person, use the Delete Person window. However, you cannot use this window to remove the records of an employee or ex-employee whom Oracle Payroll processed in any payroll runs.

### Contacts

When you delete a person from the system anybody entered as a contact is also deleted if:

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

If the contact is used by another person or has other information set up (for example, assignment or applicant information) the contact is not deleted. However, Oracle HRMS removes the record of their relationship to the deleted person.

If you use the Delete Person window to delete a person set up as a contact, Oracle HRMS removes all records of that contact and any relationships.

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

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

## Setting Up Special Information

**To set up Special Information Types:**

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

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

**Oracle HR Only**

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

1. Consider whether you want to create configured versions of the windows in which you can enter and display Special Information. These are the Special Information window and the List People by Special Information window.

See: *Windows You Can Configure, Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Design the task flows for entering personal information, which should include the Special Information window.

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

3. Design your navigation menus, including the List People by Special

Information window (or your configured versions of it) and the personal information task flows.

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

4. Consider your special information reporting requirements. A standard Skills Matching report is supplied. This compares the special information, such as skills, held by employees and applicants with the requirements of a job or position.

See: Skills Matching Report, page 3-126

## Entering Special Information

Basic personal information is handled in a fairly standard way from enterprise to enterprise. However, other types of information are recorded and used in quite different ways. Examples include training records, disciplinary records and medical records. Enter this type of information in the Special Information window.

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

### To enter special information for a person:

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

## Enabling Special Information Types

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

### To enable Special Information Types:

1. Select the special information types you want to use in your Business Group.
2. Enable each type by checking the Enabled check box.

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

The information types ADA Disabilities, ADA Disability Accommodations, and OSHA-Reportable Incident are already enabled when you receive Oracle Human Resources, and ready to use for ADA and OSHA reporting.

See: ADA Reporting, *Oracle HRMS Enterprise and Workforce Management Guide*

See: OSHA Reporting, *Oracle HRMS Enterprise and Workforce Management Guide*

## Running the Update Person Names Program

The Update Person Names concurrent program updates stored person names in the specified legislation or in all business groups. You run this program:

- When you first use the person-name-formats function, to populate the stored names (list names, order names, and full names)
- Whenever you update or delete an existing List Name, Order Name, or Full Name format mask

If you fail to run Update Person Names, HRMS does not populate or update stored person names. Therefore, names may be null or appear in an unexpected format.

Run the Update Person Names concurrent program in the Submit Request window.

### To run the Update Person Names program:

1. In the Name field, select Update Person Names.  
The Parameters window opens.
2. Select a Format Type value.
3. Select a legislation. HRMS updates person names of the specified format type defined in business groups that have this legislation code. If you select no legislation, HRMS updates person names in all business groups.
4. Set Disable WHO Trigger to Yes or No.

If you set Disable WHO Trigger to Yes, HRMS prevents update of the following WHO (audit-related) columns in the table PER\_ALL\_PEOPLE\_F while the Update Person Names program is running:

- LAST\_UPDATE\_DATE
- LAST\_UPDATED\_BY
- LAST\_UPDATE\_LOGIN

Note that, when you disable the WHO trigger, you prevent update of these columns by *all* users and for the whole table PER\_ALL\_PEOPLE\_F while Update Person Names is running. This setting does not apply only to rows updated by the Update Person Names program.

When the program completes, HRMS re-enables the WHO trigger.

**Note:** If you set Disable WHO Trigger to Yes and the program fails to complete, WHO column updates may remain disabled. If Update Person Names fails, your system administrator must check the status of the WHO trigger and re-enable it if necessary.

5. Click Submit.

HRMS reformats all names of the specified type in the selected legislation. For information about how HRMS selects an appropriate format mask, see Person-Name Formats, page 2-26.

# Contracts

## Contracts

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

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

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

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

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

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

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

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

- If the alteration of a hire date for an employee results in the start date for the contract being after the start date of the referencing assignment, the contract start date is automatically amended to the new hire date.

- A contract cannot be deleted if an assignment currently refers to it, irrespective of the assignment status.
- When you are selecting a contract to reference to an assignment you will only be able to select from contracts that have start dates on or before the assignment start date.

## Creating Contract Statuses

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

### To create contract statuses:

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

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

1. Enter the lookup code. Adding a prefix to the lookup code defines whether the contract status is active, inactive or obsolete.
  - **A-**: You should use this prefix to indicate a contract status is active.
  - **O-**: You should use this prefix to indicate a contract status is obsolete.

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

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

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

## Defining Contract Letter Types

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

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

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

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

**To define a contract letter type:**

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

## Entering Contracts

You enter and maintain contracts in the Contracts window.

**To enter a new contract:**

1. Set your effective date to the start date of the contract.
2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.
3. Select the status that indicates the contract is active. The period of service dates will also be displayed if a corresponding period of service exists.  
See: Creating Contract Statuses, page 2-53
4. Select the contract type.
5. Select the status of the contract, such as pending, opened, printed and so on. You must set up document statuses using the user extensible Lookup Type DOCUMENT\_STATUS. Enter the date the document status of the contract changed.

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

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

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

8. Save your changes.

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

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

### **Maintaining Contracts**

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

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

### **Deleting Contracts**

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

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

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

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

## **Managing Contracts**

The Manage Contracts folder enables you to:

- search for different groups of people using a wide variety of criteria
- view basic person information and comprehensive contract information

- initiate a mail merge to produce written contracts
- mass update the document status of contracts
- navigate to the Person, Assignment and Contracts windows.

## Find Contracts

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

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

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

### To find contracts:

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

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

**Note:** You can generate contracts for a person's assignment that is not covered by a contract. See: *Generating and Printing Contracts*, page 2-57

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

## Manage Contracts

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

choose the fields to view.

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

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

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

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

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

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

4. Choose OK.

The selected contracts are updated with the new document status.

## **Generating and Printing Contracts**

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

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

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

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

For example, you might want to record detailed information against the assignment that is covered by a contract, but include more general information on the printed contract. On the assignment covered by a contract you could set up a location of

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

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

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

**To select an assignment:**

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

**To generate a contract:**

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

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

4. Choose OK.

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

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

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

6. If your letters are produced by Oracle Reports, they are ready for printing. If you

use your word processor's mail merge facility you are ready to merge the data.  
See: Merging the Data File With the Standard Letter MultiMate or WordPerfect,  
*Oracle HRMS Configuring, Reporting, and System Administration Guide*

# Employees

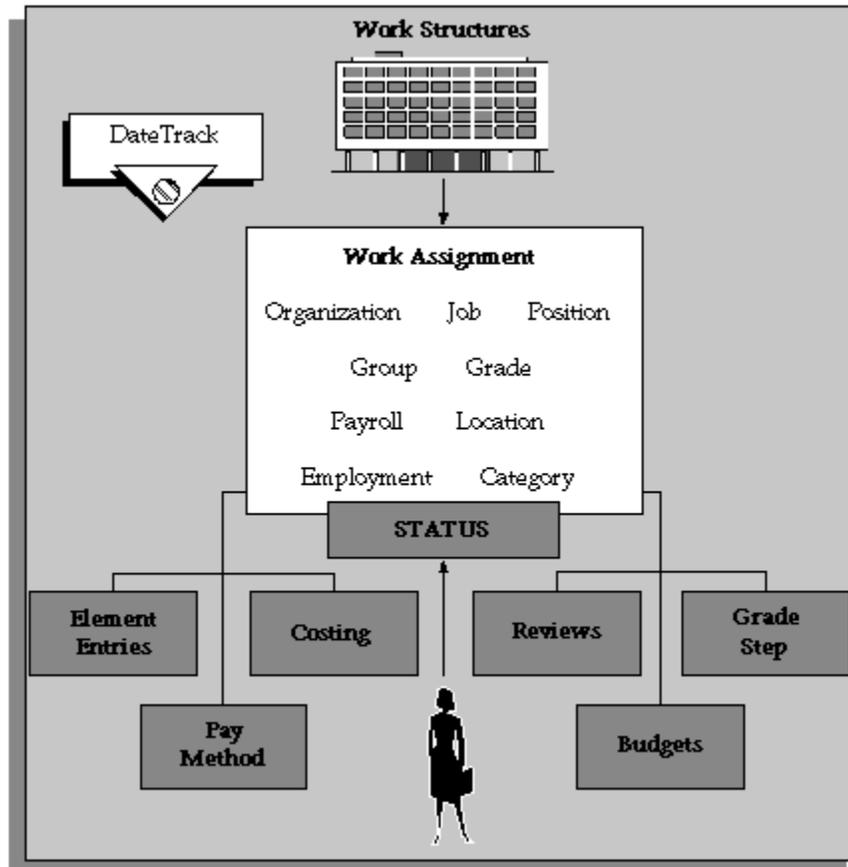
## The Employee Assignment

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

In Oracle HRMS, many of the activities you undertake in human resource management, such as vacancy management and budget planning, are based around assignments and not people. In particular, you enter all earnings, deductions, and other pay-related elements for the employee assignment, rather than the employee. This makes it possible to give an employee two or more assignments when this is necessary.

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

## Employee Assignment



When you hire an employee, Oracle HRMS automatically creates a default assignment for that employee. This is because an employee must have a current assignment at all times. You then record relocations, promotions, transfers and so on as changes to the existing assignment. These changes are datetracked so that you can make future-dated changes in advance and view the history of changes to an assignment.

## Components of the Assignment

At a minimum, an assignment defines the Business Group and GRE for which an employee works, the date the assignment began, and its current status, such as active or suspended.

You can use the assignment to define more precisely the place of the employee in the enterprise, including his or her job, position, organization, location, grade, and supervisor. You can also assign the employee to any of the employee groups you set up using the People Group key flexfield, such as pension groups or unions.

You can assign employees to an employment category, such as Part Time - Regular or Full Time - Temporary. Your startup data includes four categories, and you can add

others for the Lookup Type EMP\_CAT.

You can assign employees to a *salary basis* and maintain their salaries or wages using the Salary Administration procedure.

## Requirements for Payroll Processing

At installations using Oracle Payroll to pay employees, each employee's assignment must include these components:

- A GRE:
- An organization with a physical location that is entered in the HRMS database.  
See: Setting Up Site Locations, *Oracle HRMS Enterprise and Workforce Management Guide*
- A payroll.
- An employment category.

Additionally, there must be on record for each assignment:

- W-4 and other tax information.
- A salary basis and an approved salary entry.

**Note:** A prerequisite for the establishment of employee tax information is entry of a primary US or Canadian residence address for the employee, and assignment of the employee to an organization having a location with a complete address.

## See Also

W-4 and Other Tax Data for Employees, *Oracle HRMS Payroll Processing Management Guide*

Setting Up Salary Administration, *Oracle HRMS Compensation and Benefits Management Guide*

## Multiple Assignments

If your enterprise permits employees to work in two or more different capacities at once and thereby become eligible for different benefits, you can enter multiple assignments for them. An employee can have multiple assignments, but only one is the primary assignment, any others are *secondary*.

Relocations, transfers, promotions and so on go on record as datetracked changes to

employees' existing assignments. You do not enter new assignments for changes like these.

For example, if a university professor of history also coaches the baseball team, receiving additional pay but retaining the same benefits, there is no reason to give him a second assignment. But if he becomes eligible for different benefits as a coach, it is best to give him a separate assignment for this work.

## Managing Multiple Assignments

Oracle HRMS separately manages each assignment, together with its associated compensation and benefits. When an employee has more than one assignment, one assignment is designated as the primary assignment. When you hire an employee (by entering a person as an employee, or by changing the person type to employee), Oracle HRMS automatically creates a primary assignment for that employee. (The Primary box is automatically checked in the Miscellaneous tabbed region of the Assignment window).

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

You can end all assignments except the primary assignment by entering a status change in the Assignment window. However to end an employee's primary assignment, you must terminate the employee, using the Terminate window.

To show that an assignment is part time, you use the employment categories Part Time - Regular or Part Time - Temporary. You could also set up a Full Time Equivalent budget, and weight each assignment as a fraction of a full time equivalent for the calculation of actual values. For more information about budgeting, see: *Human Resource Budgets, Oracle HRMS Enterprise and Workforce Management Guide*

For overtime purposes, the application combines the total hours worked for employees with multiple assignments or joint employment.

Notice that when employees split their time between two departments performing the same job, or fulfill two different roles in one organization, you do not need to define two separate assignments to maintain accurate costing records. You can set up cost allocation to distribute proportions of one assignment's payroll costs to different cost centers.

For more information see: *Costing Information at the Organization and Assignment Levels, Oracle HRMS Enterprise and Workforce Management Guide*

## Managing Changes in Assignment Information

When an employee experiences changes such as a promotion or transfer, or moves from full time to part time, you change a component of the assignment. A change to any of the assignment components produces the DateTrack prompt.

- If you choose *Correction*, Oracle HRMS overwrites the existing assignment

information back to the last effective from date.

- If you choose *Update*, Oracle HRMS records the date and change, and retains the original information.

By changing your effective date on the system, you can see the employee's assignment at any point in time. You can also view the changes made to the assignment over time using DateTrack History.

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

## Effects of Changing an Assignment

Changing any assignment component can have the following effects:

- The employee may lose eligibility for some compensation types, benefits or deductions, and gain eligibility for others. You receive a warning that the system automatically ends any unprocessed element entries for which the employee is no longer eligible.
- The employee may have a different level of access to Oracle HRMS, since the system's security is based on assignment to work structures.
- If you change the employee's grade when a grade step placement exists for the assignment, you receive a warning message that the placement will be date effectively ended and any future placements will be deleted. Also, the special ceiling point field is cleared.

**Note:** If an assignment change causes the system to change element entries, you may not be able to save the change if a current or future pay period is closed. You must reopen the period or change your effective date to make the change.

## Ending Assignments and Terminating Employees

Oracle HRMS does not permit an employee to exist in the system without an assignment. That is, an employee must always have at least one assignment at any point in time. This means that for an employee with just one assignment, the only way to end the assignment is to terminate the employee, using the Terminate window.

For employees with more than one assignment, you can end all but one of their assignments by selecting an assignment status of End or Terminate in the Assignment window. At sites using Oracle Payroll, the choice of End or Terminate controls the ability to include the assignment in a payroll run after the date the assignment ends.

Sites not using Oracle Payroll can use these two statuses to provide information. For example, End may mean that further pay processing cannot occur for the assignment, while Terminate may mean that further processing can occur. Alternatively, these sites can simply use the status End.

## Employment Information

As well as recording personal information about employees you also need to record how they work for your enterprise. Oracle HRMS enables you to manage all your employment information and track the changes in employment information for each employee over the lifetime of their employment.

Oracle HRMS enables you to efficiently manage change in your enterprise for appropriate groups of people:

- Where a change affects a group, you can effect that change for every individual in the group according to a set of rules.
- Where a change affects only a few individuals, you can enter changes for just those individuals.

In Oracle HRMS, you manage these changes through the *employee assignment*:

- The assignment connects employees to your enterprise's work structures and policies, so that changes to the structures and policies are reflected in the employee's records.
- You can query groups of employees with similar assignments (such as all assignments on grade C2) and make changes for each employee in these groups.

Also, Oracle HRMS provides a number of predefined inquiry windows and reports for employment information. You can create your own inquiries and reports using QuickPaint or other reporting tools. For more information see: Information Access, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

## Summary of Employment Information

The following table shows the employment information typically held for an employee in Oracle HRMS, and how you enter it. When the Method of Entering uses the Assignment window, notice that you could also use a window created from a people management template.

## ***Employment Information***

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<b>Employment Information</b>	<b>Method of Entering</b>
Job Title or Position	Assign the employee to work structures in the Assignment window.
Department	
Location	
Grade	
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Name of manager or position to report to	Use a position hierarchy or enter supervisor name in the Assignment window.
Salary	Assign to a salary basis in the Assignment window; enter amount in the Salary Administration window.
Benefits	Enroll the employee in a Flex Program, Non-flex Program, Savings Plan, or Miscellaneous Plan.
Pay Frequency	Assign to a payroll in the Assignment window.
Pay Method	Accept the default from the payroll to which the employee is assigned or select a method in the Personal Payment Method window.
Full time/part time status	Assign to an employment category.
Standard Work Day	Enter in the Assignment window or accept the default from the organization or position to which the employee is assigned.

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Employment Information	Method of Entering
Work Schedule	Enter in the Miscellaneous tabbed region of the Assignment window, or accept the default schedule of the organization the employee is assigned to.
Accrual of Paid Time Off for Vacation or Illness	Enroll employee in appropriate accrual plans.
Notice Period	You should hold full text procedures and regulations outside the system. You can associate groups of people with different rules or procedures using the People Group key flexfield.
Disciplinary procedure	
Costing	Enter cost codes for the assignment in the Costing window, or accept the default from the organization to which the employee is assigned.
Costing (with Oracle Payroll)	Enter cost codes together with timecard information using batch element entry (BEE), or accept the defaults from the employee's assignment or organization.
Probation Period	Enter in the Assignment window.
Collective Agreement	Enter a collective agreement in the Collective Agreements window and then select it in the Assignment window.
Collective Agreement Grades	Link the collective agreement to a grade structure and enter reference grades for it in the Agreement Grades window. Then, select the grade structure in the Assignment window and enter a combination of valid grade factors for it.

## Employment History

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

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

## Entering Payment Methods for an Employee Assignment

Your enterprise may pay employees by check, by direct deposit of funds into their bank accounts through the National Automated Clearing House Association (NACHA), or by a combination of these payment types.

Depending on the policies of your enterprise, you may enter several payment methods for an employee assignment, so long as these are valid methods for the assignment's payroll. For example an employee may request that you use direct deposit to send 80% of her pay to a checking account, 10% to a savings account, and 10% to a credit union.

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

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

**Note:** As the GRE is the organization that pays employees and withholds their taxes, you must associate every employee assignment with a GRE.

See: GREs and Other Data Region, page 2-106

To enter payment methods you must:

- Assign the employee to a payroll.
- For third party payment methods, define the payee in the Organization window (using the classification Payee Organization) or the Contact window (using the relationship Payments Recipient). You must create multiple payment methods to allow the attachment numbers for separate involuntary deduction to display on all third party payments.

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

1. Set your effective date to the date on which to begin paying the employee by this method.
2. In the Name field, select a payment method.

3. Enter a number in the Priority field to determine the order for Oracle Payroll to use each payment method. It uses the method with the lowest number first.

If an employee with two assignments requests the same payment method for both, give them different priority numbers to determine their order of use.

4. Enter either the amount or percentage of the assignment's pay to be paid by this method.

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

5. The Type field displays Cash, Check or NACHA. If the type is NACHA, open the Bank Details window for entry of information about the employee's bank account.

### **NACHA Prenote Information for Oracle Payroll**

For someone currently employed in your enterprise whose bank information NACHA has already verified, enter the verification date in the Prenote Information region. Oracle Payroll automatically checks the Issued box, and immediately uses this payment method to route payments through NACHA.

For a new employee with unverified bank information, leave the Issued and Date fields blank. Oracle Payroll pays the employee by check when it next processes pay for the employee, and sends a zero payment through NACHA. It enters this payment date in the Date field and checks the Issued box.

For a 10-day waiting period, it makes all further payments to this employee by check. If during this time the bank informs you of erroneous information, you correct the information and clear the Issued box. When next processing the employee, Oracle Payroll sends another zero payment through NACHA to restart the verification process.

When the 10-day waiting period passes with no notification of errors and no manual clearing of the Issued box, Oracle Payroll automatically starts making regular payments to the employee through NACHA.

## **Entering Previous Employment Details**

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

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

- Previous Employer
- Previous Job

- Assignment - Previous Job Mappings

**To enter previous employment details:**

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

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

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

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

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

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

### **To enter previous job details:**

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

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

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

See: Entering Further Previous Job Information.

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

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

10. Save your work.

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

1. Select an empty row in the Assignment region or place your cursor within an existing row and choose the New button to add a new row.
2. Select an assignment to map to a previous job specified at steps 12 to 19.
3. Select a job to map to the assignment selected at step 21. Selecting a job

automatically displays the Start Date and End Date fields as specified for the job in the Previous Job region.

4. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
5. Use the Further Information flexfield to enter further previous job usage details.
6. Save your work.

# Student Employees

## Student Employees Overview

In some legislations, students may follow a work-study program, where the work component meets some or all of the costs of the study component. Typically, the government or the educational institution the student attends partially or wholly funds the student's employment. In the U.S., for example, federal work-study funds can pay for the student's employment in community service, America Reads, or America Counts programs. In HRMS, students enrolled in work-study programs are referred to as *student employees*.

## Student Employees in Oracle HRMS

The Oracle Student System (OSS) component of Oracle's E-Business Suite is the primary tool for the management of student data, such as admission, enrollment, and fee information. You create student employee records in Oracle HRMS so that you can include student employees in your payroll.

Student employees may be liable for selected taxes. For example, student employees in the U.S. are usually exempt from FICA (Medicare and Social Security) contributions but liable for other federal and state taxation.

Some integration tasks are necessary before you can create student employee records.

See: Setting Up Integration of OSS and HRMS, page 2-77

## Creating Student Employee Records

To create a student employee record in HRMS, you use the HRMS Enter and Maintain Student Employee function. This function extracts student details from OSS, which you can amend before storing them in HRMS. To create multiple student employee records, you can use the Enter and Maintain Student Employee interface. Alternatively, you can download data extracted from OSS to a spreadsheet, update the data if necessary, and upload the spreadsheet contents to HRMS. (HRMS flags errors in the spreadsheet.) The latter approach, which uses the Web ADI function, is most useful for creating several (for example, more than ten) records.

For each student employee, HRMS creates a person record of system type Employee and user type Student Employee. (You define the user type and can use a different name.)

## When HRMS Records Already Exist

Before creating a student employee record, HRMS compares the following values, in the following order, with those in existing person records:

1. Trading Community Architecture (TCA) party ID
2. National identifier
3. The combination of last name, first name, and date of birth

If any of these items produces a match, HRMS displays the person's record as a potential duplicate record. You can either indicate that there is no match, or update the existing record. If you update the existing record and the person is currently:

---

An applicant or ex-applicant	HRMS converts the person to an employee.
An ex-employee	HRMS rehires the person as an employee.
An ex-contingent worker	HRMS hires the person as an employee.
A contact	HRMS creates a new employee record.
A student employee	HRMS updates the record with any changes you enter.
A regular employee	HRMS updates the record to include the student employee assignment.
A contingent worker	HRMS raises an error. An individual cannot be both an employee and a contingent worker.

---

**Note:** If HRMS displays existing **applicant** records for the person that do **not** relate to their work-study program, you must create an applicant record for their work-study employment (using the HRMS professional user interface) and convert it to a student employee record using the Enter and Maintain Student Employee function.

Before converting an existing record to a student employee record, HRMS prompts you to confirm the action. By default, the hire date for new student employees is the effective date. You can change this date before uploading records to HRMS.

## Oracle Student System (OSS) Person Details EIT

When HRMS creates a student employee record, the application also creates an Oracle Student System (OSS) Person Details Extra Information Type (EIT). The segments of this EIT, which HRMS populates, are:

- OSS Person Type, which is the person type (for example, student) recorded in OSS
- OSS Person Number, which is the student's TCA Party ID
- Alternate ID Type and Number, which record other identification values (such as national identifier) used by OSS
- Synchronize OSS Data, which controls automatic synchronization of the student's address and telephone number between HRMS and OSS. This segment is set to Yes by default.

See: Maintaining Student Employee Data, page 2-75

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

## Address Styles

Address structures in OSS are different from those in HRMS, which are specific to the legislation. HRMS uses the country value from the student's primary address in OSS to identify the appropriate local address style. If the local address style is not installed, then HRMS uses the global address style for that country.

## Maintaining Student Employee Records in HRMS

The integration of HRMS with OSS simplifies not only the creation of student employee records but also the maintenance of common student employee data.

See: Maintaining Student Employee Data, page 2-75

## Maintaining Student Employee Data

You create student employee records in HRMS using data extracted from Oracle Student System (OSS). To help you maintain student records, HRMS can copy automatically to OSS any change you make to common data (data that appears in both HRMS and OSS student records). Currently, this synchronization does not occur from OSS to HRMS; therefore, Oracle recommends that you maintain your student employee records in HRMS.

**Note:** You can use the Enter and Maintain Student Employee interface, which is designed for student employee data, for both the creation and maintenance of student employee records. Alternatively, you can use the People window and People Management templates to update student employee records.

## How Data Synchronization Occurs

A student's personal information, including name, gender, address, telephone number, national identifier, and passport and visa details, is common to HRMS and OSS. The synchronization of common data between HRMS and OSS is controlled by:

- The HZ: Protect HR Person Information profile option.

This profile option controls the synchronization of common data. The profile option is set to No by default, which *enables* data synchronization between HRMS and OSS. If you set this option to Yes, no data synchronization occurs. This profile option applies to all student employees.

**Note:** Synchronization of national identifiers between HRMS and OSS does not occur, regardless of the profile option setting.

- The Synchronize OSS Data field in the person EIT (Oracle Student System (OSS) Person Details) for student employees.

This field determines whether synchronization of the student employee's address and telephone information occurs. HRMS holds a telephone number as a single value, whereas OSS holds it as multiple values (country code, area code, subscriber telephone number, and so on). To prevent HRMS using the complete telephone number to update the subscriber telephone number field in OSS, you can set Synchronize OSS Data to No. This setting prevents synchronization of changes to a student's address and telephone number, but does not affect the synchronization of other person information controlled by the HZ: Protect HR Person Information profile option.

**Note:** If you receive the error message "Please enter valid address elements: COUNTY, CITY" when attempting to update the city and county values in an HRMS student employee record when address synchronization with OSS is enabled, do one of the following:

- Disable synchronization of changes to the student employee's address and telephone information by setting Synchronize OSS Data to No.

In this case, you must apply the changes manually to both the HRMS and OSS records.

- Set the profile option HZ: Address Validation Level for Application to "No Validation".

## When a Student Employee's Status Changes

HRMS and OSS do not automatically share changes to a student employee's status:

- A student who ceases to be a student in OSS remains a student employee in HRMS until you manually terminate their employment.
- A student whose employment you terminate becomes an ex-employee in HRMS; however, HRMS does not communicate this change to OSS.

## Identifying Differences Between HRMS and OSS Student Records

Oracle HRMS provides a Student Employee Comparison Report, which you can run periodically, that identifies differences between the versions of common data held by HRMS and OSS. To run this report, select the Comparison Report function from the Student Employee menu.

Using the information in the report, you can correct inconsistencies between HRMS and OSS student records. To take advantage of automatic data synchronization, make your corrections in HRMS.

## Setting Up Integration of OSS and HRMS

1. To create student employee records in HRMS, you use the Enter and Maintain Student Employee function. To run the Student Employee Comparison Report, you use the Comparison Report function. These functions are available in the Student Employee menu in menus associated with the standard responsibilities (for example, US HRMS Manager). If necessary, add these functions to the menus of other authorized users.
2. For creation and update of multiple student employee records, you can use standard Web ADI functionality. Ensure that relevant users have access to Web ADI and that you have configured WEB ADI correctly.

See: *Implementing Web ADI for use with Oracle HRMS, Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Define the user person type Student Employee for the system person type Employee. You can use a different user person type name; however, the term "student employee" appears in documentation and in the user interface.

See: *Defining Person Types, Oracle HRMS Configuring, Reporting, and System Administration Guide*

4. In the U.S., exclude students from EEO and related reports that include employees with particular employment categories:

- Define a new employment category for student employees in the lookup EMP\_CAT.
- Do **not** register the new category as a reporting category for the business group.

**Note:** Assigning a new employment category to student employees does not exclude them from New Hire reports.

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

5. The profile option HZ: Protect HR Person Information controls data synchronization between HRMS and OSS. By default, HZ: Protect HR Person Information is set to No, which means data synchronization is enabled. If you set the option to Yes, data synchronization between OSS and HRMS does not occur.

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide* and Maintaining Student Employee Data , page 2-75

6. If appropriate, define grades, jobs, and positions for student employees, and add segments to the People Group flexfield for student employee information. Such definitions can help you manage student employee records.

See: Defining a Job, *Oracle HRMS Enterprise and Workforce Management Guide*, Defining a Position, *Oracle HRMS Enterprise and Workforce Management Guide*, Defining a Grade, *Oracle HRMS Compensation and Benefits Management Guide*, and User Definable Key Flexfields, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

When you create student employees in HRMS, be sure to select any employment categories, jobs, positions, and grades you have defined for them.

# Contingent Workers

## Contingent Workers

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

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

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

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

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

## Entering Contingent Workers

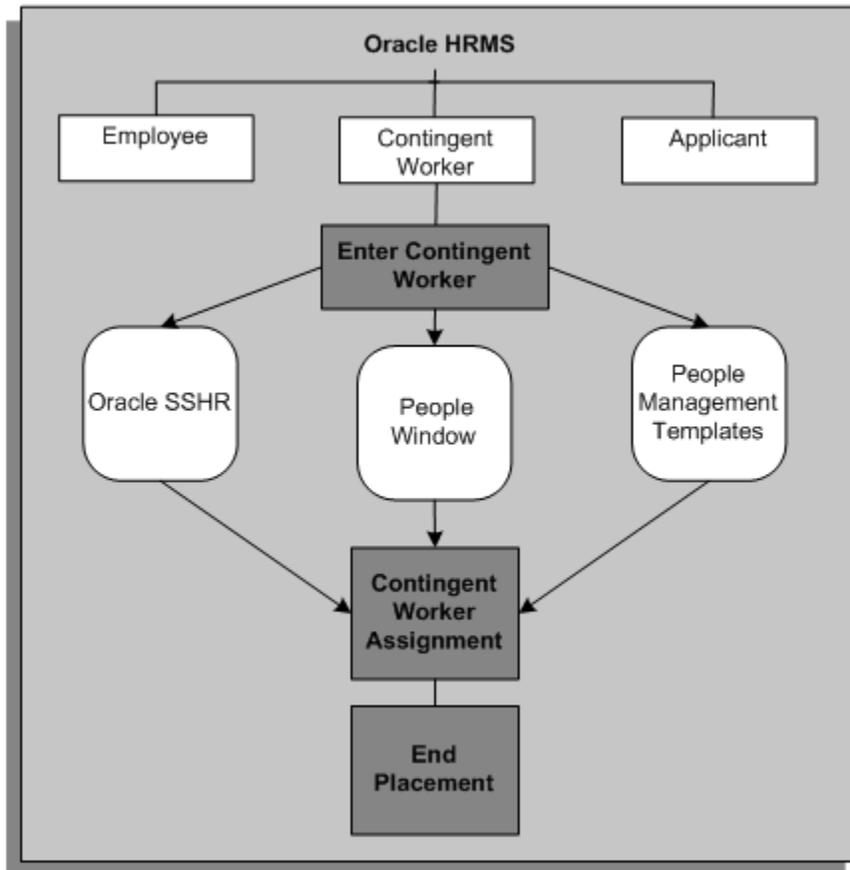
Every enterprise must be able to enter and hold personal information for its workforce. You can enter personal information for contingent workers using the People window or the People Management templates.

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

### **Contingent Worker Support in Oracle SSHR**

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

## Contingent Worker



## The Contingent Worker Assignment

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

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

### Period of Placement

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

placement start date or end after the period of placement end date.

### **Assignment Rate Types and Assignment Rates**

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

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

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

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

## **Ending a Placement or Assignment**

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

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

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

### **Canceling a Placement**

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

## **Separating Contingent Workers from Employees Using Oracle HRMS**

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

### **Contingent Worker Person Types**

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

### **Contingent Workers and Oracle HRMS Security**

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

### **CustomForm**

Many of the windows used in Oracle HRMS are multipurpose windows. For example, the People window can be used to enter and maintain personal details for employees, contingent workers, and applicants. You can create a separate version of some Oracle HRMS windows to cater specifically for contingent workers using *CustomForm*. For example, you could create your own version of the People window to cater solely for contingent workers.

### **Task Flow**

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

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

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

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

## **The Contingent Worker Assignment**

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

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

enter standard conditions or supplier details against the contingent worker assignment.

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

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

## Components of the Assignment

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

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

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

## Multiple Assignments

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

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

## Managing Multiple Assignments

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

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

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

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

## Managing Changes in Assignment Information

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

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

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

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

## Ending Assignments and Terminating Contingent Workers

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

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

## Contingent Worker Suppliers

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

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

## Defining Suppliers

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

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

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

## Defining a Combination of Assignment Rate Type and Basis

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

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

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

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

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

4. Save your work.

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

See: Entering Assignment Rates for Contingent Worker Assignments, page 2-86

## Entering Assignment Rates for Contingent Worker Assignments

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

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

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

Use the Assignment Rates window.

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

1. Set your effective date to a date early enough for any historical information you want to enter.
2. Select the name that identifies the required combination of rate type and basis.

See: Defining a Combination of Assignment Rate Type and Basis, page 2-85

The Rate Type and Rate Basis fields are completed automatically.

3. Select a currency for the assignment rate.
4. Enter a monetary value for the assignment rate. For example, if the rate type is Weekend Rate and the basis is Hourly Rate, enter the hourly rate for weekend assignments.
5. Repeat steps 2 through 4 for additional assignment rates.
6. Save your work.

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

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

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

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

- An ex-contingent worker can begin a new placement on the day following the end of their latest placement.
- An ex-employee can begin a placement on the day following the termination of their employment.

See: Appointments and the Hiring Process, page 1-23

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

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

# Employee Transfers and Secondments

## Employee Transfers and Secondments

Employees are often required to move to different business locations. When such moves occur internationally, they usually involve moving from a *source* HRMS business group to a *destination* HRMS business group. To support such a move, you must create or update the employee record in the destination business group. In the source business group, you must either terminate the employee record (if the move is permanent) or suspend active assignments.

By means of *deployment proposals*, the Oracle HRMS Global Deployments function automatically creates or updates records as required when you move an employee between business groups. This function supports both temporary deployments (known in HRMS as *secondments*) and permanent transfers. Some setup tasks are necessary before first use of the Global Deployments function.

See: Setting Up Employee Transfers and Secondments, page 2-99

## Deployment Proposals

The deployment proposal controls the secondment or transfer of an employee to a different business group. The deployment proposal identifies the:

- Source and destination business groups
- Reason for the deployment
- Deployment dates
- Employee to be deployed
- Employee's new assignment
- Contacts accompanying the employee

To create a deployment proposal, the HR Professional in the destination business group uses the Global Deployments function.

**Note:** To create a deployment proposal, the HR Professional must have access to the employee's record in the source business group.

Depending on security settings, this access may not be available. In this case, either the employee or an HR Professional in the source business group can use the SSHR Release Information function to release the

employee's record to the HR Professional in the destination business group.

The status of the deployment proposal can be:

- Draft
- Active
- Complete

The deployment proposal is in Draft status until the deployment begins. Its status is Active if the deployment is temporary and has started. Its status is Complete if:

- The deployment is temporary and has finished.
- The deployment is permanent and has started.

An employee can have multiple Draft deployment proposals but only one Active deployment proposal at a time.

## Initiating a Deployment

To initiate a deployment, the HR Professional selects Initiate Deployment for the relevant deployment proposal on the Global Deployments page.

## Initiating a Permanent Transfer

When the HR Professional initiates a permanent transfer, the status of the deployment proposal changes from Draft to Complete.

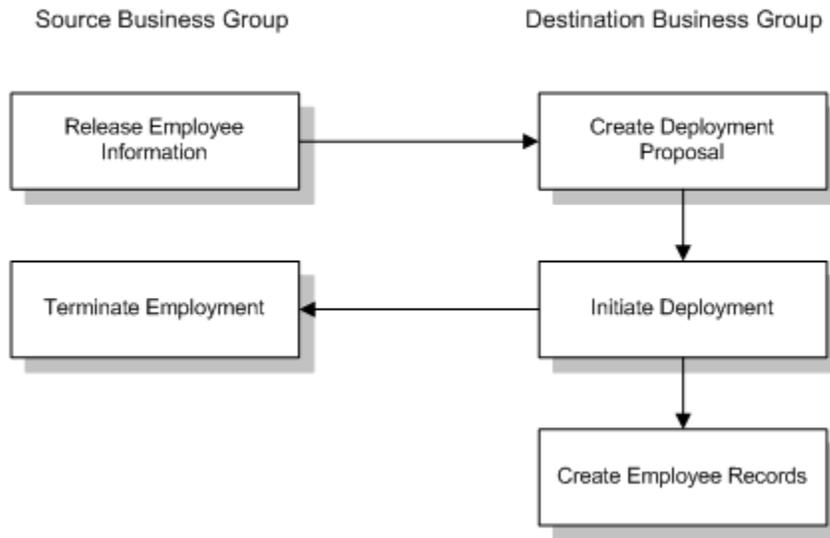
In the *source* business group, HRMS terminates the employee record on the day before the deployment start date and sets the status of all assignments to the default terminate-assignment status. The person type is Ex-Employee from the deployment start date.

**Note:** HRMS does not automatically set the Final Process Date (FPD) in the source business group. Setting FPD remains a manual task.

In the *destination* business group, HRMS creates or updates employee, assignment, and contact records using information from the deployment proposal. The person type and assignment status are those entered in the deployment proposal for the new assignment.

The following figure summarizes the stages of a permanent transfer:

## Permanent Transfer



### Initiating a Temporary Secondment

When the HR Professional initiates a temporary secondment, the status of the deployment proposal changes from Draft to Active.

In the *source* business group, HRMS:

- Changes the current assignment status to the default suspended-assignment status. The effective date of the change is the start date of the deployment.

If the default suspended-assignment status is not included in a payroll, but you want to continue paying the employee in the source business group, you can change the assignment status manually.

- Leaves the person type unaltered. However, you can update the person type manually to indicate that the employee is on secondment, for example.

In the *destination* business group, HRMS creates or updates employee, assignment, and contact records using information from the deployment proposal. The person type and assignment status are those entered in the deployment proposal for the new assignment.

For information about maintaining the records of employees on secondment, see *Employee Records During Secondment*, page 2-98

### Dates in the Destination Business Group

For both permanent transfers and temporary secondments, HRMS sets key dates in the destination business group as follows:

Date Field	Contains	Comments
Effective Date (Hire Date)	Deployment Start Date	
Latest Start Date	Deployment Start Date	
Date First Hired	Date First Hired from Source Business Group	
Period of Service Start Date	Deployment Start Date	
Adjusted Service Date	Hire Date from Source Business Group	
Projected Termination Date	Deployment End Date	For temporary secondments only
Projected Assignment End Date	Deployment End Date	For temporary secondments only

## Initiating a Return from Secondment

To terminate a secondment, the HR Professional selects Initiate Return for the relevant deployment proposal on the Global Deployments page and enters the end date, which is the final day of the deployment. This date can differ from the deployment end date recorded in the deployment proposal. (Note that the application takes no action by default on the end date recorded in the deployment proposal.)

The status of the deployment proposal changes from Active to Complete when you initiate the return, regardless of how far in the future the end date occurs.

**Note:** As you cannot update a complete proposal, do not initiate the return until the end date is certain.

In addition, in the *destination* business group, HRMS:

- Terminates the employee record and sets assignments to the default terminate-assignment status on the deployment end date
- Sets the termination reason and person type to values specified on the Initiate Return page

HRMS sets the following dates in the destination business group to the deployment end date:

- Projected Termination Date
- Actual Termination Date
- Projected Assignment End Date
- Assignment Status Change Date

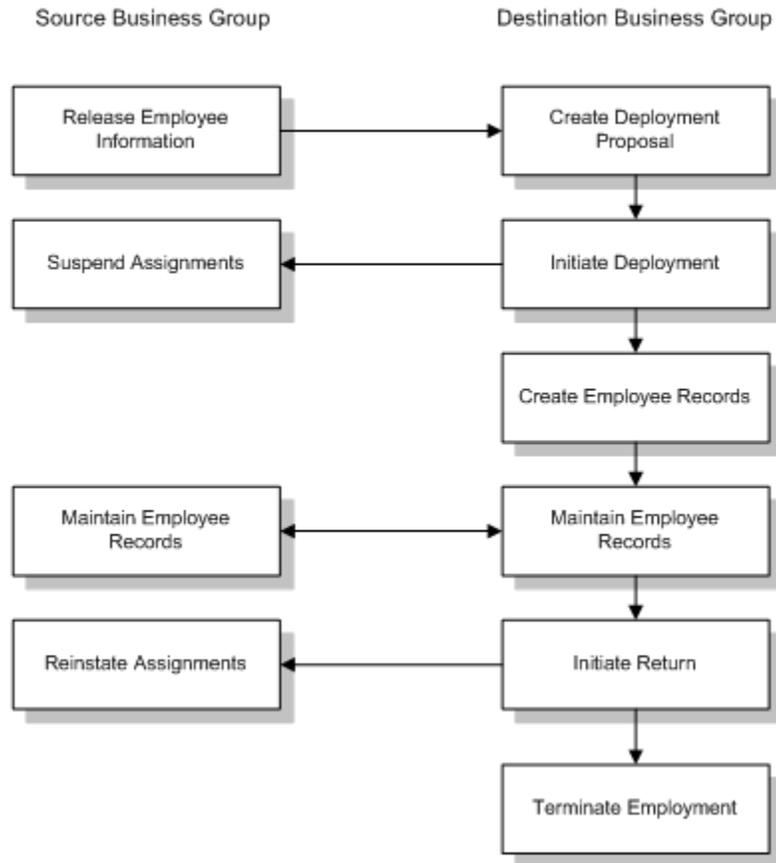
The employee's person type is Ex-Employee from the day following the deployment end date.

**Note:** HRMS does not automatically set the FPD in the destination business group. Setting FPD remains a manual task.

In the *source* business group, HRMS changes the status of assignments suspended at the start of the secondment to *Active Assignment*. The effective date of these changes is the day following the deployment end date.

The following figure summarizes the stages in a temporary secondment:

## Temporary Secondment



### Back-to-Back Deployments

An employee returning from a secondment must have at least one day's employment in the source business group before beginning any subsequent secondment or transfer. You cannot use the Global Deployments function to move an employee directly from one destination business group to a second destination business group.

### Updating Deployment Proposals

For information about updating deployment proposals, see [Updating Deployment Proposals](#), page 2-95

### Employee Numbering

When you transfer an employee permanently or temporarily to a different business group using the Global Deployments function:

- The employee keeps the employee number from the source business group if your

enterprise uses global employee numbering.

- You can enter an employee number in the deployment proposal if your enterprise uses manual employee numbering in the destination business group.

In all other cases, HRMS allocates a new number to the employee using the numbering scheme in effect in the destination business group when you initiate the deployment.

## Completing Initial Setup of Employee Records

The deployment proposal contains sufficient information for HRMS to create employee records in the destination business group and supply key data. However, you may need to enter additional information manually. For example:

- The application creates basic assignment information. You are recommended to review the assignment record and complete it as required.
- Other than assigning the employee to any payroll that you identify in the deployment proposal, the Global Deployments function has no effect on payroll and benefits setup. You may need to supply additional pay and benefits information for the employee.
- The application does not create optional records, such as the competency profile and qualifications records. If you intend to maintain these records in the destination business group, you must create them manually.
- In the U.S., you cannot assign an employee to a payroll unless you also enter the employee's primary address. As the deployment proposal does not contain address data, you must leave the Payroll field blank if the destination business group is in the U.S. and you use Oracle Payroll. After you initiate the deployment, you can log on to the destination business group to complete payroll setup and enter the employee's primary address.

See: *Entering People's Addresses at Sites with Oracle Payroll*, page 2-161

For information about maintaining the records of employees transferred temporarily, see *Employee Records During Secondment*, page 2-98

## Viewing Employee Records After Deployment

If the HR Professional or manager in the source business group needs access to the employee's records in the destination business group, the employee can release that information using the SSHR Release Personal Information function.

HR Professionals and managers in the destination business group can access the deployed employee's records in the source business group using the SSHR My Employee Information function. After a permanent transfer, employee information in the source business group remains available only while the deployment proposal exists.

If you delete the deployment proposal, the employee record in the source business group is no longer accessible from the destination business group.

## Updating Deployment Proposals

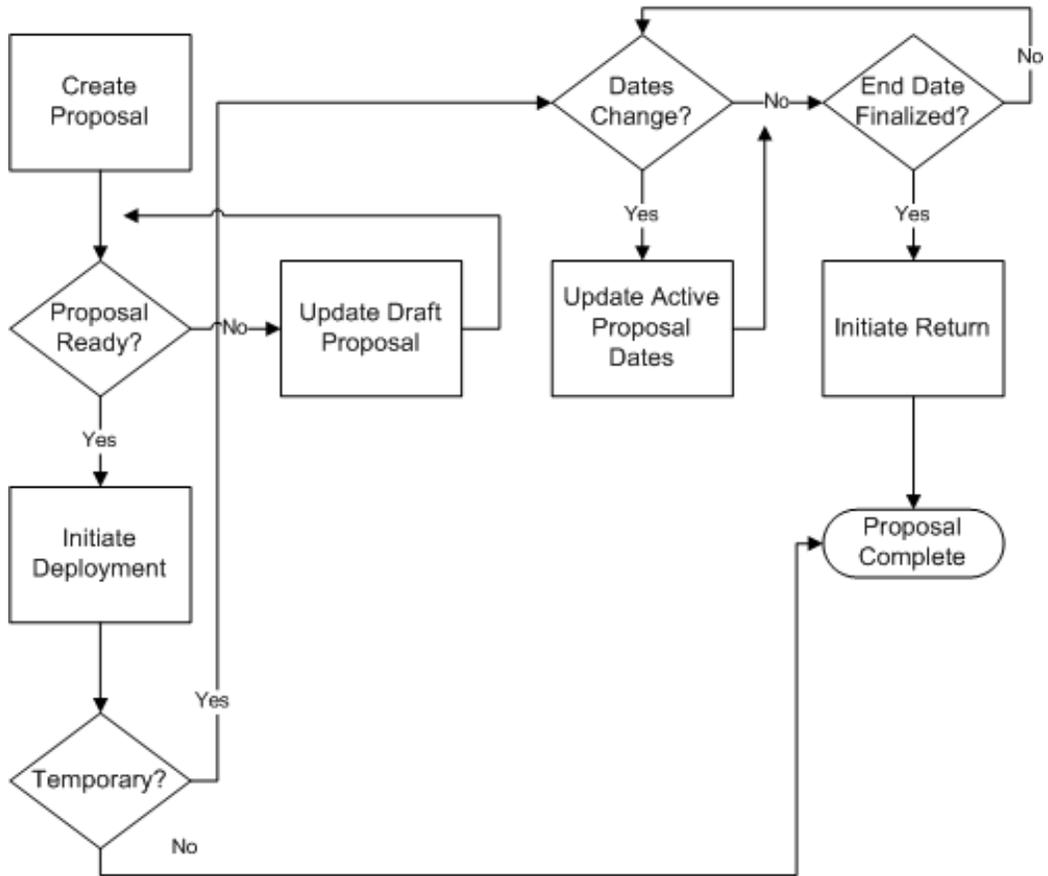
The changes that you can make to a deployment proposal depend on the proposal status. When you initiate a deployment proposal, its status changes from Draft to:

- Active, if the deployment is temporary
- Complete, if the deployment is permanent

When you initiate a return from secondment, the proposal status changes from Active to Complete.

The following figure shows the stages of a deployment proposal and indicates where updates are possible. The remainder of this topic discusses the changes that you can make at each stage.

### Stages of a Deployment Proposal



## Updating Draft Deployment Proposals

While the deployment proposal is in Draft status, you can update it as often as necessary. You can update any part of the proposal except:

- The name of the employee to be deployed
- The deployment type
- The name of the destination business group, which sets the context for all other information in the proposal

## Updating Active Deployment Proposals

Once a deployment proposal for a secondment is Active, you can change its start and end dates. If you change the start date of a secondment, HRMS updates:

- All date fields containing the deployment start date in the destination business group
- The date of the assignment-status change in the source business group

**Note:** If the new start date is in the past, and you have made other changes to the employee records since then, DateTrack rules may prevent HRMS from updating these dates.

If you change the end date of a secondment, HRMS updates:

- The Projected Assignment End Date in the destination business group  
This change is effective on the date that you make the change.
- The Projected Termination Date of the period of service in the destination business group

The employee record in the source business group is unaffected by a change to the deployment end date.

## Updating Complete Deployment Proposals

You cannot update a deployment proposal that has a status of Complete. To change the dates of a permanent transfer, you must:

- In the source business group, manually reverse the employment termination and terminate the employment again on the revised date.

See: Canceling a Termination, page 2-154

- In the destination business group, change the employee's start date.

## Deleting Deployment Proposals

You can delete Draft and Complete deployment proposals, but you cannot delete an Active deployment proposal.

**Note:** When you initiate a permanent transfer, HRMS terminates the employee's record in the source business group. The employee's manager in the destination business group can view this terminated record using the SSHR My Employee Information function only if the deployment proposal is available. Therefore, although you can delete proposals for completed deployments, Oracle recommends that you do not delete those for permanent transfers.

## Employee Records During Secondment

When you use the Global Deployments function to transfer an employee temporarily to another business group, HRMS automatically:

- Creates or updates employee records in the destination business group
- Suspends the employee's current assignments in the source business group

During the secondment, the employee has records to maintain in both business groups.

## Maintaining Employee Records in Multiple Business Groups

HRMS provides standard mechanisms for maintaining employee data in multiple business groups:

- Employees have both local records (at the business-group level) and a corporate record (which links records for the same employee in multiple business groups). Some employee data is held in the corporate record, and the application automatically applies changes made to that data in one local record to all local records for the employee.

See: People in a Global Enterprise, page 2-7

- HRMS can automatically synchronize person data that is considered to be global and that is held in multiple business groups for the same employee, such as e-mail address and correspondence language.

See: Person Record Synchronization, page 2-21

## Creating and Maintaining Optional Records

When the HR Professional initiates a deployment, HRMS does not create most optional components of the employee record, such as the competency profile and the qualifications record. However, the following records are visible by default from other business groups:

- Qualifications
- Establishments Attended
- Competency Profile (global competencies only)

**Note:** You can use and view global competencies throughout the enterprise. Local competencies are accessible in a single business group only.

You may need to create and maintain such records manually in the destination business group if, for example, you want to perform an appraisal or record additional competencies achieved during a secondment.

## Returning from Secondment

When a secondment ends, HRMS automatically:

- Terminates the employee record in the destination business group
- Reinstates suspended assignments in the source business group

During a secondment, HRMS can maintain most employee data automatically. However, you are recommended to review employee records in the source business group when a secondment ends and make any additions or corrections. For example, you may want to update the employee's competency profile or qualifications record.

If person record synchronization has not been enabled during the secondment, run the Person Synchronization report to identify differences and make any changes manually.

See: Person Record Synchronization, page 2-21

## Setting Up Employee Transfers and Secondments

Perform the following setup tasks before first use of the Global Deployments function.

### To set up employee transfers and secondments:

In destination business groups:

1. Add reasons for employee transfers and secondments (for example, Career Development, Business Need, and Skills Transfer) to the Deployment Reasons (HR\_DEPLOYMENT\_REASONS) lookup.

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

2. For employees on secondment to this business group, define additional user person types for the Employee and Ex-Employee system person types. For example, define the user person types:

- Employee on Secondment (for the Employee system person type)
- Ex-Seconded Employee (for the Ex-Employee system person type)

See: Defining Person Types, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. To identify the assignments of employees on secondment, define user assignment statuses (for example, Active Secondment) for the system assignment status Active

Assignment.

See: Defining Assignment Statuses (Assignment Window), page 2-103

4. Add assignment-status-change reasons applicable to employees on secondment (for example, Employee on Secondment) to the Employee Assignment Change Reason (EMP\_ASSIGN\_REASON) lookup.

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

5. For employees completing secondments, add termination reasons (for example, Completed Secondment) to the Leaving Reason (LEAV\_REAS) lookup.

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

6. In deployment proposals, HR Professionals can elect to exclude transferred or seconded employees from U.S. New Hire reports and specify a reason. To extend the list of reasons for exclusion, update the US New Hire Exceptions (US\_NEW\_HIRE\_EXCEPTIONS) lookup.

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

7. By default, the Global Deployments function appears on the global People menu. Add the function to relevant HR Professional menus.

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

In source business groups:

1. Add the SSHR Release Information function for HR Professionals, which appears by default on the global People menu, to relevant HR Professional menus.

In both source and destination business groups:

1. Review the setting of the HR: Propagate Data Changes profile option at the site level. If you do not set this profile option to Yes, the application cannot automatically propagate changes made to the records of employees on secondment.

See: Person Record Synchronization, page 2-21

2. Consider using the Checklists function to assign and track standard, repeatable tasks associated with employee transfer and secondment.

See: Checklists Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

# Workforce Information Management

## Assignment Statuses

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

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

## Primary Statuses

There are four system statuses for assignments:

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

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

- **Active Application:** This is the normal status of an application as it progresses through the selection stages.
- **Offer:** Use this status for your preferred candidate when an offer has been made.
- **Accepted:** Update the preferred candidate's assignment to Accepted status when

you are ready to hire him or her in the People window.

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

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

## User Statuses

On your system, you may give these statuses different *user statuses* appropriate to your enterprise. Each system status can have several user statuses related to it. For example, for employees you can define several different user statuses for the system status Suspend Assignment, you can have the user statuses Paternity Leave, Disability Leave, or Education Leave. When you use Oracle HRMS, you only see the user statuses.

For applicants, you can track the stages of your selection process by means of user statuses. You can define user statuses such as Applicant Received, Applicant Acknowledged, First Interview, and Second Interview for the system status Active Application. These statuses can trigger the production of standard letters.

These statuses are *primary* because they determine how the system processes and manages the assignment. An assignment must have one, and only one, primary status at a given time. You enter this status in the Assignment window, or using a people management template window.

## Using Assignment Statuses to Control Compensation

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

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

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

## Secondary Assignment Statuses

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

For example, suppose your primary status Maternity Leave applies to employees both

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

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

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

## Setup To Allow Processing After Termination

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

Use the Assignment Statuses window to make sure your system has a user status that corresponds to:

- the HR system status of *Terminate Assignment*
- the Payroll system status of *Process*

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

## Defining Assignment Statuses (Assignment Window)

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

### Defining Primary User Statuses

#### To rename a user status:

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

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

1. Insert a new record.
2. Type in your user status name.
3. If you are using iRecruitment, you can enter an external status for your applicant assignment user statuses. This status is displayed to candidates in iRecruitment. For example, you may want to create an external status of 'Interview' for applicant

assignment user statuses of 'Pending Interview' and 'Interview Passed'. The candidate in iRecruitment would see the external status and the manager would see the user status names.

4. Select a Human Resource system status.
5. For employee assignment statuses, you must also select a Payroll system status. You must do this, even if you do not have Oracle Payroll. If you have Oracle Payroll, the payroll system status controls whether payroll processes the assignment in a payroll run.

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

6. Save the new status.

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

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

You cannot delete a user status, but you can prevent its use by deactivating it. To deactivate a user status, uncheck the Active check box.

### Defining Secondary Statuses

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

### To create a secondary status:

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

The Type field displays *Secondary*.

## Entering an Assignment

When you enter or hire an employee, Oracle HRMS automatically creates a default assignment for that employee. You can view and update the default assignment in the Assignment window.

You can then enter additional assignments for an employee, if required. Enter additional assignments using the Assignment window.

### To enter an assignment:

1. Set your effective date to the start date of the new assignment.
2. Select the organization to which you want to assign the employee.

By default for the first assignment, the employee has an assignment either to the Business Group organization, or to the organization to which he or she was an applicant.

**Note:** If you are using Oracle Payroll, the organizations to which employees have assignments must have on record a location with a complete address including a city and state. The system uses this address to determine employees' work locations for tax purposes.

See: Setting Up Site Locations, *Oracle HRMS Enterprise and Workforce Management Guide*

**Note:** If you overwrite a new employee's default assignment to an organization, a window appears asking if the change is an update or a correction. Select Correction. If you are using Oracle Payroll, it is especially important to select Correction, so that the work location for the employee's tax records is correctly recorded.

3. Select the job or position to which this employee has been assigned.  
If you are creating an additional assignment, no default Business Group or Organization is displayed.
4. Select the job or position for which this person has been assigned. If you are using Oracle Payroll to pay the employee, the assignment must include an employment category.
5. Select any other components included in this employee's assignment (groups and employment category).
6. Select a grade for information or to use grade rates or grade scales to determine the

appropriate compensation level for employee.

7. If a location is defined for the Business Group or other organization, it appears as a default. Change this, if required.
8. Select a payroll if you are paying the employee using Oracle Payroll, or if you intend to record for the employee certain types of compensation and benefits (represented on the system by *nonrecurring elements*).

**Note:** If Oracle Payroll is installed and you are an HR User, you cannot assign employees to payrolls. Ask your system administrator to change your HR:User Type profile option if you need to assign employees to payrolls.

9. Select a Status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).

See: Assignment Statuses, page 2-101

10. Enter an Assignment Number to uniquely identify the assignment. By default, this number is the same as the Employee Number, for the employee's first assignment.
11. Select a collective agreement if the employee is covered by one.  
You can only calculate values based on a collective agreement for an employee's primary assignment.
12. Select the employment category, for example part-time or full time and select the employee category, for example blue collar or white collar.
13. Enter the information you want to hold in the tabbed regions, for example, supervisor details, special ceiling progression points or salary information.

**Note:** You must associate all employee assignments (except any unpaid voluntary assignments) with a GRE, using the tabbed region GREs and Other Data.

## Entering Additional Assignment Details (Assignment Window)

Once you have set up basic assignment details, you can enter additional information, such as supervisor details, special ceiling progression points, and salary information, in the tabbed regions of the Assignment window. The tabbed regions that appear in the Assignment window vary according to person type and localization.

The tabbed regions that appear in the Assignment window vary according to person

type and localization.

**Note:** You must associate all employee assignments (except unpaid voluntary assignments) with a GRE using the tabbed region Statutory Information.

### **To enter salary information for an employee:**

Using the Salary Administration window, you can enter a proposed salary change for an employee, associate this change with a performance review, and accept or revise the change later. To administer an employee's salary in this way, you first assign the employee to a salary basis in the Salary Information region.

1. Choose the Salary Information tabbed region.
2. Select a salary basis for the employee.
3. You can also enter the frequency of salary and performance reviews.

**Note:** If you change an employee's salary basis to a basis that uses a different salary element, the employee's existing salary element entry will be ended. Using the Salary Administration window, you should make a new salary entry for the employee, effective from the date of the salary basis change.

For more details about the additional information you can enter refer to Additional Employment Information, page 2-114

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

You use the Supplier tabbed region to record information about the supplier providing the contingent worker to your enterprise. The procedure depends on whether you are using Oracle Services Procurement to provide purchase order information for contingent worker assignments.

#### **If you are not using Oracle Services Procurement:**

1. Choose the Supplier tabbed region.
2. Select the names of the supplier and the supplier site for the contingent worker.
3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

#### **If you are using Oracle Services Procurement:**

1. Choose the Supplier tabbed region.

2. Select a purchase order number for this assignment.
3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.
4. Information from the purchase order appears automatically in the Supplier Name and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.
5. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

### **To enter supervisor information for an employee or contingent worker:**

1. Choose the Supervisor tabbed region.
2. Select the name and number of the worker's personal supervisor. If you use assignment-based supervisor hierarchies, select the supervisor's assignment number.

You can select a contingent worker as a supervisor only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.

**Note:** This information shows the personal supervisor for an employee and is not updated by the system. Use organization and position hierarchies to show management reporting lines.

### **To enter probation period and notice information for an employee:**

The probation period defaults from the employee's position.

1. Choose the Probation and Notice Period tabbed region.
2. Amend the default probation period for your employee's assignment, if required.
3. Enter the notice period for the assignment, if required.

### **To enter standard conditions information for an employee or contingent worker:**

To enter schedule information for a person, you can:

- Set up extensive availability information such as, shifts, schedules, and calendar events using integrated features from HRMS and Common Application Components (CAC).

See: *Setting Up Availability, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

- Set up holiday calendars, shifts, and work plans in OTL.

See: *Time Management Structures, Oracle Time and Labor Implementation and User Guide*

Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the Assignment window.

**Important:** The application does not use the schedule information that you can enter here to determine a worker's availability. This is for information purposes only.

The decision for which method to set up is based on knowledge of which applications use which information.

The standard work day information (apart from the Hourly/Salaried field) defaults from the position. If standard conditions are not defined for the position, they default from the employee's organization or Business Group.

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent worker's assignment, if required.
3. This step is for employees only. For benefit administration, enter whether your employee's assignment is hourly or salaried. If you are in the US, benefits are often based on whether a person is paid hourly or receives a salary.

**Note:** If you are setting up benefits based on salaried or hourly pay you must set up the Hourly/Salaried field in addition to the Pay Basis. The Pay Basis identifies how pay is quoted within Salary Administration and enables an employee to have their pay quoted as hourly, but be paid a salary. Therefore, for benefits, you need to set up whether your employee is paid hourly or receives a salary.

4. Select the Working at Home check box if the employee's work location is the same as their residence. When you check this box, the employee is assumed, for tax purposes, to work 100% from their primary address (or tax override address, if there is one) for this assignment.

**Note:** Checking this box does not change the assignment location, which you can maintain separately for legislative reporting. Also, the SUI State does *not* change automatically to the resident state,

but you can change it on the Federal Tax Rules window.

See: Entering Federal Tax Rules for an Employee, *Oracle HRMS Payroll Processing Management Guide*

**To enter U.S. statutory information:**

Use the Statutory Information tabbed region to place the employee assignment in a GRE, and enter other information. Many of these fields are state-specific and required if you are using Oracle Payroll to produce state quarterly wage listings.

1. Click in the field on the Statutory Information tabbed region to display the GREs and other data window.
2. Select the GRE (Government Reporting Entity) for the assignment.  
  
The GRE is the organization holding a federal Employer Identification Number (EIN) that is responsible for paying employees, withholding their taxes, and issuing the Form W-2, Wage and Tax Statement. Additionally, the GRE is responsible for providing certain government-mandated reporting, such as EEO-1 and VETS-100 reports.
3. If the employee must submit a timecard, select Yes in the Timecard Required field and select the name of the employee approving the timecard.  
  
Oracle Payroll does not process pay for employees required to submit timecards who fail to do so.
4. You can select a work schedule for the assignment. This field may display a default work schedule for the employee's organization.  
  
Oracle Payroll uses the work schedule to prorate pay for the employee. By scanning the work schedule, the payroll run detects mid-period assignment start or end dates, and mid-period pay increases or decreases.
5. If this employee assignment is for shift work, select the shift regularly worked.
6. You can enter the spouse's salary, which can be a state requirement for married couples to qualify for reduced rates if they are filing jointly.
7. Select Yes in the Legal Representative field if you send the W-2, Wage and Tax Statement form for this employee to his or her legal representative. A legal representative can be, for example, the employee's custodian, parent, or attorney.
8. To override the usual Workers Compensation job code for the assignment, select the override code in the WC Override Code field.

See: Entering a WC Override Code, *Oracle HRMS Payroll Processing Management*

*Guide*

9. Specify the Reporting Establishment.

You must make sure that you have specified the Reporting Unit Numbers for your Reporting Establishments in the Work site Filing window. The State Quarterly Wage Listing process requires this number for the S records of some states.

This field is required for SQWL generation.

10. If this employee is a seasonal worker, select Yes in the Seasonal Worker field. The default is No.

This field is required for SQWL generation.

11. If this employee is an officer of your corporation, enter 1 in this field.

This field is required for SQWL generation.

12. (Wyoming only) Indicate if this assignment is for a corporate officer, specify their position.

This field is required for SQWL generation.

13. (Alaska only) Specify the area code and occupational code.

This field is required for SQWL generation.

To find the Area Code and Occupational Code for this employee, consult the Occupational Coding Manual for Employers published by the Alaska Department of Labor.

14. (Indiana only) If you want to enable Oracle Payroll to withhold tax at a location other than the one you entered in the Assignment window, select the alternate location in the Taxation Location field.

This field is required for SQWL generation.

The Taxation Location overrides the actual work location for the assignment with a location used only for the purpose of calculating payroll tax. Use this field only if you want to override the Vertex tax location (which depends on the zip code of the assignment location).

**Note:** This field supports Indiana county tax legislation that requires an employee who changes locations to be taxed at the old location for the remainder of the calendar year. In these instances, Oracle Payroll clears the Taxation Location field every January 1st. If you are using this field for something other than an Indiana county tax solution, please get confirmation that using this field is the appropriate solution.

**Note:** Oracle Payroll does not automatically create the necessary tax records when you use the Taxation Location field. You must create the tax records for the state, county, and city, along with the appropriate percentages, as necessary.

15. (Missouri only) Select the appropriate probationary status for the employee.

This field is required for SQL generation.

**To enter primary or secondary assignment and miscellaneous information for an employee or contingent worker:**

1. Enter the internal address details (such as the floor or office number), if required. The system adds the details to the location address.
2. Select a reason for adding or changing the assignment. For example, you can use the Reason field to record promotions for your employees. You define valid reasons as values for the lookup types Reason for Change to Employee Assignment (EMP\_ASSIGN\_REASON) for employees and Contingent Worker Assignment Reasons (CWK\_ASSIGN\_REASON) for contingent workers.
3. Select the Manager box if the assignment is at manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.)
4. By default, the first assignment entered for an employee is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, the Primary box is automatically unchecked. You can leave the Primary box as it is.

To change primary assignments:

Check the Primary check box to update a secondary assignment to Primary.

See: Changing Primary Assignments, page 2-115

5. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the date appears in the Projected Assignment End field. Otherwise, enter the projected end date of the assignment.

**To enter special ceiling information for an employee:**

A special ceiling progression point is the highest point the Increment Progression Points process can automatically progress the employee.

1. Choose the Special Ceiling tabbed region.
2. Enter a special ceiling if the employee is assigned to a grade, and a grade scale is defined for this grade. This special ceiling overrides the ceiling defined for the grade scale.

**To enter a billing title for an employee or contingent worker (Oracle Projects only):**

1. Choose the Project Information tabbed region.

**Note:** The Projects Information tabbed region displays only if you have Oracle Projects installed.

2. Enter a billing title. The information you enter in the Billing Title field is used as the default title on project customer invoices. You can override this information using Project Accounting.
3. Enter a project title.

**To enter grade ladder information for an employee:**

You must enter grade ladder information to use the Grade/Step Progression process.

1. Choose the Grade Ladder tabbed region.
2. Select the grade ladder for this assignment. If you selected a grade for this assignment previously, all the grade ladders that use that grade are available. If you have not selected a grade, all the active grade ladders in your enterprise are available.

**To enter bargaining unit and union membership information for an employee:**

1. Choose the Bargaining Unit tabbed region.
2. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized negotiating organization. For example, this could be WFL-CIO or UAW.

**Note:** You set up your different bargaining units as values for the Lookup type BARGAINING\_UNIT\_CODE.

3. Select whether the employee associated with the assignment is a member of a union.

### To enter employment terms for an employee:

1. Choose the Employment Terms tabbed region.
2. Select the contract that is to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment start date.
3. Select the agreement grade structure for the collective agreement. A window is displayed showing the grade factors for that grade structure.
4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet that criteria.

If you enter values directly into the grade factor fields, they must correspond to an existing reference grade unless the Override Allowed check box in the Agreement Grades window is checked.

**Note:** Any new combinations of values that you enter will not be available for reuse with other assignments. In order to reuse a combination, you must define it as a reference grade in the Agreement Grades window.

## Additional Employment Information

Just as you can record additional information about people, such as their addresses, contacts, and skills, you can also record additional information associated with each employee assignment. The main items of information are as follows:

- If you are using Oracle Payroll, use the Tax Rules window to maintain W-4 and other required tax information.

See: Tax Information for an Employee Assignment, *Oracle HRMS Payroll Processing Management Guide*

- You can propose or approve a salary change in the Salary Administration window.

**Note:** To pay employees using Oracle Payroll, they must have an approved salary on record.

See: Entering Salaries and Salary Changes, *Oracle HRMS Compensation and Benefits Management Guide*

- You can make entries to the earnings, deductions, benefits and other elements the

employee is eligible for, using the Element Entries window.

See: *Making Manual Element Entries, Oracle HRMS Compensation and Benefits Management Guide*

- If you use a pay scale and progression point system, you can place the assignment on a pay scale using the Grade Step Placement window.

See: *Placing an Employee on a Grade Step, Oracle HRMS Compensation and Benefits Management Guide*

- You can select the cost centers or accounts to which the costs of the assignment should be allocated, using the Costing window.

See: *Costing Data at the Organization and Assignment Levels, Oracle HRMS Enterprise and Workforce Management Guide*

- You can use the Assignment Budget Values window to specify the value of the assignment in terms of headcount, full time equivalent (FTE), or any other budgets you have defined.

See: *Human Resource Budgets, Oracle HRMS Enterprise and Workforce Management Guide*

- For employees who have assignments to payrolls, you can select the methods by which the employee wants to receive pay for this assignment in the Personal Payment Method window.

See: *Entering Payment Methods for an Employee Assignment, page 2-68*

- You can enter secondary assignment statuses for analysis and reporting, if these have been defined on your system.

See: *Entering Secondary Assignment Statuses, page 2-117*

1.

## Changing Primary Assignments

Over time, a secondary assignment may need to be elevated to a primary assignment. Most enterprises have requirements to show this history of changes in an employee record. You can change assignments from secondary to primary in the Hiring Applicants window or the Managing Employees window.

This process creates two historical records: one showing a secondary assignment that ended, say, on 20 October, and the other showing that the primary assignment started as one set of components and then changed to another set (those of the secondary assignment) on 21 October.

### **To change a primary assignment:**

1. Set an effective date for the change of primary assignment.
2. Find the person using the Data Organizer or the Find window.
3. Select the person in the Data Organizer and select one of their assignments.
4. Choose the Actions button.
5. Select Make Primary Assignment and choose Next.

The system automatically changes the previous primary assignment from primary to secondary. Query the assignment details to see the changes, or use the Assignment History window to view the employee's assignments. DateTrack History also shows the changes made to assignments.

For more information about DateTrack see: *Viewing the History of Datetracked Information, Oracle HRMS Enterprise and Workforce Management Guide* and *Managing Change Over Time, Oracle HRMS Enterprise and Workforce Management Guide*

6. **Mexico only:** If the change in assignments involves a change of GREs, you must specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region.

## **Ending an Assignment (Assignment Window)**

An employee must always have one active assignment. If an employee has multiple assignments you can end any of their individual assignments by selecting an assignment status of End or Terminate in the Assignment window as long as at least one assignment remains active. If you want to end all employee assignments at the same time you use the Termination window. An employee does not become an ex-employee until you have terminated their last assignment.

The following information explains how to use the Assignment window to end multiple assignments.

### **To end one of several assignments:**

1. Query the assignment you want to end.
2. Set your effective date to the actual termination date for the assignment.
3. Update the assignment status to End or Terminate Process Assignment (or the equivalent user status on your system) in the Status field:

- Use *TerminateProcess Assignment* (with a Payroll system status of *Process*) if further pay processing of the assignment is required after the date the assignment ends. This leaves the assignment's final processing date open so that further processing can occur.

It is often best to use this status, so that you can process any necessary adjustments to the final pay for the assignment.

- Use *End* (with a Payroll system status of *Do Not Process*) if all pay processing for the assignment is finished. This makes your effective date the assignment's *final processing date*, after which no further processing for the assignment can occur.

The End status is not recorded on the assignment. It causes the assignment to end as of the effective date of entry of this status.

**Note:** To temporarily prevent pay processing for this assignment, use the status *Terminate Assignment* (with a Payroll system status of *Do Not Process*). When no further processing is required and you are ready to set a final processing date, update the status to *End*.

4. **Mexico only:** Specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region. The Social Security Affiliation reports require this information.

## Entering Secondary Assignment Statuses

Your implementation team may have created secondary assignment statuses for analysis and reporting of employee or applicant assignments.

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

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

### To give a secondary status to an assignment:

1. Select the status and enter a start date.
2. You can also select a reason for giving the new status.

When a status no longer applies, simply enter an end date.

## Removing Title from Person Search Lists

To remove the title from existing records without updating them you should run the Remove Title from Person's Full Name concurrent process. This concurrent process enables you to remove the title so that it does not appear in Person Search lists, such as the Find window on the Person window.

You run the Remove Title from Person's Full Name concurrent process from the Submit Requests window.

### To remove title from person's full name:

1. Select Remove Title from Person's Full Name in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select a legislation.
4. Choose the OK button.
5. Choose the Submit button.

## Using Mass Assignment Update

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

### Process Overview

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

### Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.
Validated New Record(s)	Target validated successfully.

### Performing a Mass Assignment Update

To make mass assignment updates for employees, contingent workers, or both, you are recommended to use the Mass Assignment Update window. If the Mass Assignment Update window is not available, use the Mass Employee Assignment Update window to make mass assignment updates for employees.

If you make mass assignment updates to working hours, frequency, or other data that affects derived Assignment Budget Values (such as FTE or Percent Full Time), recalculate and update the values using the concurrent process Calculate Assignment Budget Values.

See: Running the Calculate Assignment Budget Values Process, *Oracle HRMS Enterprise and Workforce Management Guide*

**Korean users only:** To make mass assignment updates for employees and contingent workers, use the KR Mass Assignment Update window.

**To identify the records you need to update:**

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply).
3. Select Contingent Worker or Employee. Select both values to retrieve records for both contingent workers and employees.
4. If you select Employee *only* and GRE (Government Reporting Entity) information applies in your legislation, go to Step 5. Otherwise, go to Step 9.
5. Click in the GRE field.  
The GREs and other data window appears.
6. Specify any GRE search criteria.
7. To exclude records from the result set defined by the GRE search criteria, choose Combinations.  
The Enter Reduction Criteria for Long-List window appears.  
For example, if you select Yes in the Seasonal Worker field in the GREs and other data window, and select Day Shift in the Shift field in the Enter Reduction Criteria for Long-List window, the result set comprises all seasonal employees, minus those who work the day shift.
8. Choose OK.
9. If the Criteria window is not already open, click in the Other Criteria field.
10. Enter or select work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all workers whose jobs begin with "MGR".
11. Choose OK.  
The People Group Flexfield window appears.
12. Specify any people group search criteria.
13. To exclude records from the result set defined by the people group search criteria, choose Combinations.  
The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify workers to be removed from the group of workers identified by the people group search criteria. For example, if you select a particular

benefit program in the People Group Flexfield window, and a pension plan in the Enter Reduction Criteria for Long-List window, the result set comprises all members of the selected benefit program, minus those belonging to the selected pension plan.

14. Choose OK.

#### **To retrieve the identified records**

15. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.  
The application displays assignment records that meet the selection criteria.
16. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

#### **To specify the changes you want to make**

17. Choose the New tab.

**Note:** Some values you can update on this tab apply to either contingent workers or employees, but not both. Although you can specify inappropriate values (for example, you can select a payroll for a contingent worker), Oracle HRMS writes a warning message to the log and does not update the worker record with invalid information.

18. Click in the Change List field.

The Change List window appears.

19. Select or enter values in fields you want to update. Choose OK.

If you are updating employee records *only* and GRE information applies in your legislation, go to Step 20. Otherwise, go to Step 21.

20. In the GREs and other data window, select or enter values in fields you want to update. Choose OK.
21. In the People Group Flexfield window, select or enter values in fields you want to update. Choose OK.
22. Select a DateTrack mode.

### **To apply your changes and submit them to the database**

23. Choose Create New.

The updated assignment records appear.

24. To make further general changes to these records before you submit them to the database, repeat from Step 18.
25. To update information for an individual worker, update the relevant record on the New tab.

**Note:** Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

26. To commit the updated records to the Oracle HRMS database, choose Submit.

The application creates a concurrent request and displays its identifier. View the results in the View Requests window.

Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See *Reviewing and Correcting Mass Assignment Update Errors*, page 2-126

## **Using Mass Employee Assignment Update**

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

### **Process Overview**

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

## Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.
Validated New Record(s)	Target validated successfully.

## Performing a Mass Assignment Update

To make mass assignment updates for employees, contingent workers, or both, you are recommended to use the Mass Assignment Update window. If the Mass Assignment Update window is not available, use the Mass Employee Assignment Update window to make mass assignment updates for employees.

**Korean users only:** To make mass assignment updates for employees, use the KR Mass Employee Assignment Update window.

### **To identify the records you need to update:**

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply).
3. Click in the People Group field. The People Group Flexfield window appears.
4. Specify any people group search criteria.
5. To exclude records from the result set defined by the people group search criteria, choose Combinations.

The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify employees to be removed from the group of employees identified by the people group search criteria. For example, if you select a particular benefit program in the People Group Flexfield window, and a pension plan in the Enter Reduction Criteria for Long-List window, the result set comprises all members of the selected benefit program, minus those belonging to the selected pension plan.

6. Choose OK.
7. If the Criteria window is not already open, click in the Other Criteria field.
8. Enter or select work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all employees whose jobs begin with "MGR".
9. Choose OK.
10. If GRE information does not apply in your legislation, go to Step 14. Otherwise, if the GREs and other data window is not already open, click in the GRE field.
11. Specify any GRE search criteria.
12. To exclude records from the result set defined by the GRE search criteria, choose Combinations.

The Enter Reduction Criteria for Long-List window appears.

For example, if you select Yes in the Seasonal Worker field in the GREs and other data window, and select Day Shift in the Shift field in the Enter Reduction Criteria for Long-List window, the result set comprises all seasonal employees, minus those who work the day shift.

13. Choose OK.

### **To retrieve the identified records**

14. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.

The application displays assignment records that meet the selection criteria.

15. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

### **To specify the changes you want to make**

16. Choose the New tab.

17. Click in the Change List field.

The Change List window appears.

18. Select or enter values in fields you want to update. Choose OK.

19. If GRE information applies in your legislation, in the GREs and other data window select or enter values in fields you want to update. Choose OK.

20. In the People Group Flexfield window, select or enter values in fields you want to update. Choose OK.

21. Select a DateTrack mode.

### **To apply your changes and submit them to the database**

22. Choose Create New.

The updated assignment records appear.

23. To make further general changes to these records before you submit them to the database, repeat from Step 17.

24. To update information for an individual employee, update the relevant record on the New tab.

**Note:** Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

25. To commit the updated records to the Oracle HRMS database, choose Submit.

The application creates a concurrent request and displays its identifier. View the results in the View Requests window.

Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See *Reviewing and Correcting Mass Assignment Update Errors*, page 2-126

## Reviewing and Correcting Mass Assignment Update Errors

When you submit a mass assignment update to the Oracle HRMS database, the application creates a concurrent request and displays its identifier. For each concurrent request, the application creates an error log file containing details of any errors. Note that Oracle HRMS does not apply invalid changes to records.

To view the results of a mass assignment update, use the Requests window.

### To review the error log:

1. In the Find Requests window, enter the concurrent request ID of the mass assignment update.
2. In the Requests window, select the request and choose View Log.

The error log appears, showing mass assignment update errors grouped by assignment number. For each error, the log includes a description of the cause and a suggested action.

### To correct the error:

Use the Mass Assignment Update window (for employees and contingent workers) or the Mass Applicant Assignment Update window.

1. Retrieve the relevant mass assignment update. Records in error have the status Error New Record(s).
2. Select the records you are correcting and deselect all other records.
3. Correct the requested changes or the DateTrack mode (as suggested in the error log) for relevant records.

**Note:** You cannot update records whose status is Completed.

4. Choose Submit.

Once you have successfully submitted all updated records, you cannot change this

mass assignment update. To make further changes to these records, you create a new mass assignment update.

If an attempted update fails repeatedly, edit the assignment record directly.

## Purging Transaction Data

Transactions such as mass updates, position transactions, and budget worksheets all store temporary data in transactions tables in your database. Once the transaction has been completed, the data in these tables is applied to permanent tables. However, a duplicate version of this data also remains in the temporary tables, taking up unnecessary space.

To clear this data once a transaction is completed, you can use one of the purge processes, depending on the type of transaction you have completed.

**Note:** These processes do not affect any applied data. All applied information is still available to edit in the normal windows.

Use the Submit Request window.

### **To run the Purge Budget Worksheets, Purge Position Transaction, or the Purge Mass Processes process:**

1. Select either Purge Budget Worksheets, Purge Position Transaction, or Purge Mass Processes in the Name field.
2. Click in the Parameters field to display the Parameters window, if it does not open automatically.
3. If you are running the Purge Mass Processes process, select the type of transaction you want to purge, for example, Mass Applicant Assignment Update, or Position Copy.
4. Select the status of the transactions you want to purge. This limits the transactions purged to only those with the selected status.
5. Enter the dates between which you want transactions cleared.
6. Click OK. You can view a log file containing details of the purge from the Requests window.

## Using Mass Applicant Assignment Update

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function

enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

### Process Overview

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

### Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.

Status	Description
Validated New Record(s)	Target validated successfully.

### Performing a Mass Applicant Assignment Update

To make mass assignment updates for applicants, use the Mass Applicant Assignment Update window.

#### To identify the records you need to update:

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply)..
3. If the People Group Flexfield window is not already open, click in the People Group field.
4. Specify any people group search criteria.
5. To exclude records from the result set defined by the people group search criteria, choose Combinations.

The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify applicants to be removed from the group of applicants identified by the people group search criteria. For example, if you select a particular professional organization in the People Group Flexfield window, and a geographical region in the Enter Reduction Criteria for Long-List window, the result set comprises all members of the selected professional organization, minus those in the selected geographical region.

6. If the Criteria window is not already open, click in the Other Criteria field.
7. Enter or select recruitment and work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all applicants for jobs that begin "MGR".
8. Choose OK.

#### To retrieve the identified records

9. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.

The application displays assignment records that meet the selection criteria.

10. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

**To specify the changes you want to make**

11. Choose the New tab.
12. Click in the Change List field.  
The Change List window appears.
13. Select or enter values in fields you want to update. Choose OK.
14. In the People Group Flexfield window, select or enter values in fields you want to update. Choose OK.
15. Select a DateTrack mode.

**To apply your changes and submit them to the database**

16. Choose Create New.  
The updated assignment records appear.
17. To make further general changes to these records before you submit them to the database, repeat from Step 12.
18. To update information for an individual applicant, update the relevant record on the New tab.

**Note:** Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

19. To commit the updated records to the Oracle HRMS database, choose Submit.  
The application creates a concurrent request and displays its identifier. View the results in the View Requests window.  
Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See Reviewing and Correcting Mass Assignment Update Errors, page 2-126

# Self-Service Actions

## Overview of Self-Service Actions

Most enterprises adhere to rules, regulations, and reporting requirements when changing the terms of work. Oracle Self Service Human Resources (SSHR) provides a set of configuration tools and web flows for initiating, updating, and approving self-service actions according to prescribed rules.

Self-service actions represent the business processes, or *actions*, that change the conditions of employment in your enterprise. Public sector organizations typically refer to these processes as personnel actions, and they include business actions that manage hiring, training, promotion, transfer, compensation, and termination. Self-service actions are useful for any enterprise that wants to configure business processes using rules to determine eligibility and approval requirements, track action history as well as details, or generate standard documents for specific actions.

Self-service actions fall into three overall types, each with its own unique expectations, rules, and requirements:

- Hiring
- Deployment
- Termination

Oracle SSHR emphasizes business process over data maintenance. Though the interface provides an online form that you fill out in the course of navigating a series of web pages, your implementation team organizes the sequence and content of the data to reflect the standards and practices of your organization. With each self-service action, your implementation team defines a process consistent with the way your organization manages changes to personnel records. You design and implement your own version of each process, and specify the business rules that enable you to route each action for approval automatically.

SSHR provides a transition from technical orientation to functional. This approach enables you to initiate and manage self-service actions as business processes with which you are already familiar, rather than maintaining data in the abstract in application windows. Your focus is on the task you need to perform. Some examples of the predefined SSHR workflow modules supported by self-service actions include:

- Hiring or termination
  - Recruitment
  - New Hire

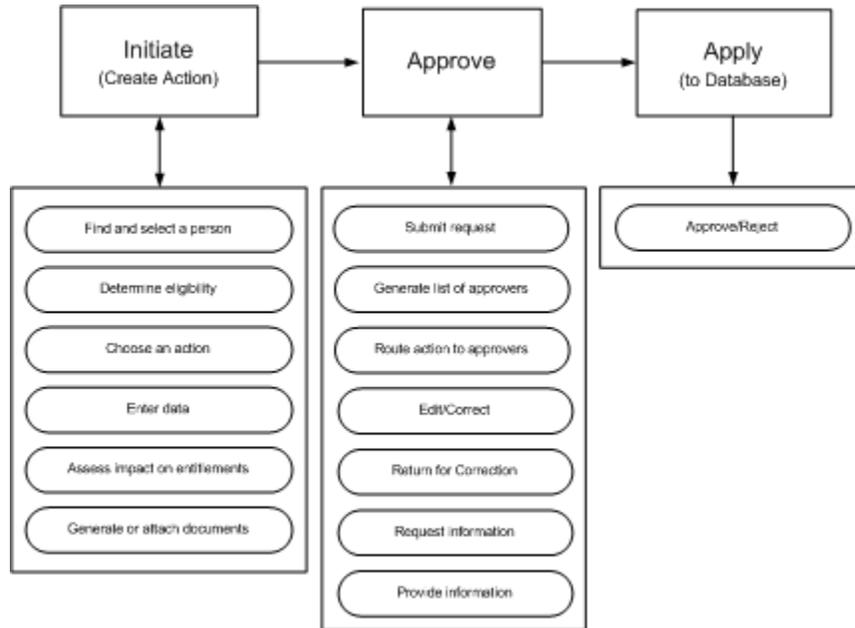
- Applicant Hire
- Termination
- Termination with compensation
  
- Deployment or status changes
  - Employee Status Change (assignment, full/part time, grade, movement within pay scale)
  - Transfer
  - Leave of Absence (long term absence, sickness, sabbatical)
  - Special/Extra Information Types (ending training or apprenticeship periods, disciplinary actions)
  - Other Employment Information (ending training or apprenticeship periods, disciplinary actions)
  - Individual Compensation Distributions (awarding bonuses or other specific pay and allowance types)

You carry out a self-service action in three overall stages that reflect standard business procedures:

- Initiate
- Approve
- Apply

For each stage, your implementation team has a range of options and features to configure unique process flows you recognize as a reflection of the way you do business. The following process flow diagram displays all the features available. What you see may differ, depending on your organization's requirements.

### **Life Cycle of a Self - Service Action**



#### **Initiate**

Advanced search capability helps you confirm that you have selected the correct person before initiating an action. The People List and Actions page tell you whether or not a person is eligible for an action on the specified effective date. The Actions page notifies you of your own pending actions on the selected person, actions you have saved for later, and actions on the selected person awaiting approval of others. If your organization's requirements permit, you can specify that your action take effect on a date you specify, or "on approval". You enter the data that your enterprise, rules, and regulations require. What-If analysis gives you a real-time view of the impact of your proposed action on the selected person's entitlements to compensation and benefits. You can generate formatted documents, such as a pre-approval Request for Action, or a standard letter, containing merged values from your action. In addition, you can attach supporting documents, such as a resume, certificate, or Web address. Before submitting your action for approval, you can add to the list of approvers, or add people to notify.

#### **Approve**

Self-service actions use Oracle's standard workflow and approvals management tools. Oracle AME generates a list of approvers and Oracle Workflow routes your action automatically. Approvers retrieve notifications from their Worklist. Approvers with appropriate update privileges can modify the action, including its effective date. Recipients can request additional information, or return the action for correction to previous approvers. If the database encounters intervening or future-dated actions on the same person, it refreshes your action with the appropriate values, or routes your action to a Human Resources representative after approval for manual entry of the changes.

## Apply

The application applies the action to the database after final approval.

SSHR workflow features enable you to engage in an online collaborative environment in which you can focus on the task of routing and approving actions based on their merits, with near transparency regarding selection and notification of approvers.

See: Configuring Self-Service Actions, page 2-134

See: Managing Conflicting Actions, page 2-137

See: Initiating a Self-Service Action, page 2-142

See: Approving a Self-Service Action, page 2-147

## Configuring Self-Service Actions

The sections below describe the process of configuring Self - Service Actions in SSHR. Some procedures are optional, for example, setting up eligibility processing or document management. Implementing the workflow processes and functions your enterprise requires is prerequisite to configuring self - service actions. When you have completed the configuration of workflow processes and functions, you must implement the following procedures:

- Set system profile options
- Define access roles
- Personalize pages
- Add a sub menu to user menus
- Set up eligibility processing
- Set up document management

If previous implementations have not configured Oracle Approvals Management (AME) with the attributes, conditions, approval types, and rules your organization requires to manage routing and approving actions, you must configure these if you want to enhance the default behavior. The default is to route the action to the top of the supervisory hierarchy or 10 levels above the Initiator, whichever comes first.

**Note:** In order to use the new workflow features associated with self-service actions, you must upgrade to the SSHR V5 approval process.

See: Implementation Steps for Self-Service HR (SSHR), *Oracle HRMS Deploy Self-Service Capability Guide*

## Set System Profile Options

Configure the system profiles at the Site level. The eight profiles directly relating to configuring self-service actions are as follows:

- HR:Allow Approver updates to Self Service actions
- HR:Allow concurrent Self Service actions
- HR:Manage Self Service actions when future-dated changes exist
- HR:Refresh Self Service actions with data from intervening actions
- HR:Display Position Hierarchy
- HR:Allow use of eligibility for Self Service actions
- HR:Allow processing of ineligible Self Service actions
- HR:Run BENMNGLE when processing a Self Service action

If you do not enable HR:Allow Approver updates to Self Service actions, only the Initiator is able to update or change the effective date of an action you return for correction. Approvers will be unable to use attachments.

Oracle recommends that you configure two related options in tandem:

- HR:Manage Self Service actions when future-dated changes exist
- HR:Refresh Self Service actions with data from intervening actions

Enable or disable these two options together. If you set the former to *Allow approval (Notify HR Rep)*, enable the latter as well.

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

## Define Access Roles

Create and assign access roles, to grant update privileges to those who approve self-service actions, or deny them to those who do not. The Initiator of an action has privileges based on menu access, and does not need an access role.

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

## Personalize Pages

Personalize self-service pages. Personalizations play a key role in configuring self-service actions, including the following:

- Personalizing workflow processes to display or hide pages or data fields (performed when you configure workflow processes)
- Personalizing the Review page to display or hide What If analysis or attachments
- Personalizing the Effective Date page to allow users to enter the effective date manually, specify that an action takes effect on approval, or both.

See: *Configuring Web Pages, Oracle SSHR Deploy Self-Service Capability Guide*

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

## Add a Sub Menu to User Menus

Attach the sub menu *HR Self-Service Pages sub menu* to user menus so that users can see the following pages:

- Effective Date
- Sub Actions
- Return for Correction
- Refresh Attributes
- Document Manager pages

See: *Defining Menus for SSHR, Oracle SSHR Deploy Self-Service Capability Guide*

## Set Up Eligibility Processing

Optionally, set up automatic determination of a person's eligibility for an action, using SSHR Compensation and Benefits functionality as a generic processing engine. You do this in four stages:

- Define Eligibility Profiles
- Define Plans (sub actions)
- Define Reporting Groups (actions)

See: *Eligibility Processing Setup Example, Oracle SSHR Deploy Self-Service Capability Guide*

## Set Up Document Management

Optionally, configure documents and groups in Document Manager to provide formatted business documents in PDF format, containing merged data from workflow

processes. Examples include Request for Change, Notification of Change, correspondence, or contracts.

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

## Managing Conflicting Actions

A typical implementation for self-service actions allows you to process multiple changes to a person's record at the same time. Another common configuration allows any approver on the chain of recipients to change the effective date of an action. The ability to process concurrent actions and choose an effective date at any point in the approval process adds both flexibility and complexity. For example, what if another manager submits a status change that affects a person's grade at the same time you are processing a job change on the same person? What if you submit a change of working hours, and another manager approves a transfer while your action is in process? What if choosing a retroactive effective date for a bonus means that another bonus (already approved) becomes effective on a future effective date to your own?

The flexibility of processing multiple changes simultaneously requires the application to handle complex interactions among three dates associated with each action:

- **Initiation date:** the date you submit your action for approval (usually the system date)
- **Effective date:** the date your approved action takes effect (not necessarily the approval date)
- **Approval date:** the date you save your action to the database

The application helps you manage complex situations arising from interactions among multiple actions and dates in three ways. Consider three scenarios:

1. **Concurrent Actions:** The application processes multiple actions on a selected person at the same time. On final approval, each action takes effect on its own effective date, superseding any actions with a previous effective date.
2. **Intervening Actions:** After your action is in process, the application encounters an approved action on the same person with an effective date that falls between your initiation date and effective date. Your setup can help you manage which information prevails, and (as appropriate) replace values in your action.
3. **Future-Dated and Retroactive Actions:** After your action is in process, the application encounters an approved action on the same person with a later effective date. Your setup can allow you to route your action to a Human Resources representative on final approval, for manual entry of all appropriate changes.

## Concurrent Actions

When you begin an action, the application checks the person/assignment combination for other actions currently in process:

- Saved for Later
- Returned for Correction
- Awaiting Approval of Others

Most implementations allow concurrent actions. Otherwise, if you try to begin an action on a person with pending changes, you cannot proceed beyond the Actions page. But in a typical setup, existing actions on the selected person appear as actions Awaiting Your Attention or Awaiting the Approval of Others.

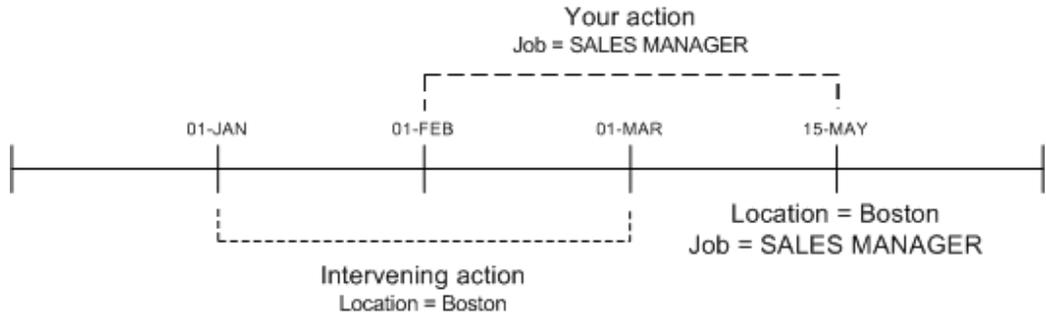
## Intervening Actions

Intervening changes can occur for a variety of reasons, most often due to delays between request and approval. Another manager can approve a change to your selected person's record after your own action has entered the approval process. When the application encounters approved changes to your selected person's record, effective somewhere between your own action's initiation date and effective date, it manages them in one of two ways. Consider two scenarios:

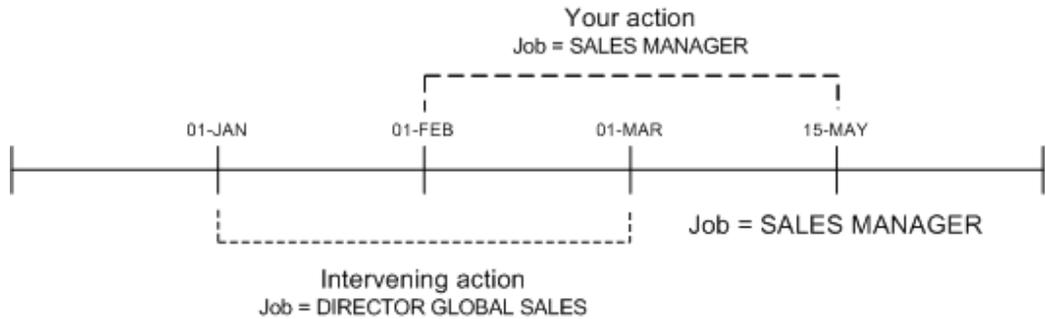
1. After you submit your job change for approval, an HR manager approves a transfer on the same person while your action is still in process. In this case, the intervening change of location prevails, because your action does not specify a location. You may still need to know about the transfer, however, in order to decide whether to approve, update, send back for correction, or cancel your job change.
2. Your action's proposed job change conflicts with an intervening change from another manager that specifies a different job. Because both your action and the intervening action specify a job, your action's proposed job prevails, because your action has the later effective date. Nevertheless, you may need to know about the intervening job change in order to make a more informed decision about your own proposed job change.

In the following illustrations, broken lines connect the initiation date and effective date of each action. Another manager approves an intervening action while yours is still in the approval process.

**Scenario 1: Intervening Action Specifying Different Attributes**



**Scenario 2: Intervening Action Specifying the Same Attributes**



Data refresh options enable you to manage potential conflicts by replacing your action's values with the changed information from the intervening action (scenario 1), or preserving the values from your action (scenario 2). The application displays a Refresh page with a table informing you of the original, intervening, and prevailing values.

**Note:** The application may also display a Refresh page if you change the effective date of your action. A new effective date can create potential conflicts with values in effect at a different point in time.

**Future-Dated and Retroactive Changes**

When the application encounters an approved change to your selected person's record, effective subsequent to your action's effective date, configuration options can help you to manage potential conflicts by routing your action on approval to a person with an HR Representative role. On review, the HR representative applies all necessary changes to the database manually.

You can perform an action on a person retroactively by choosing a past effective date. The application treats changes to the person's record subsequent to your effective date as future-dated actions, and routes your action on final approval to an HR representative.

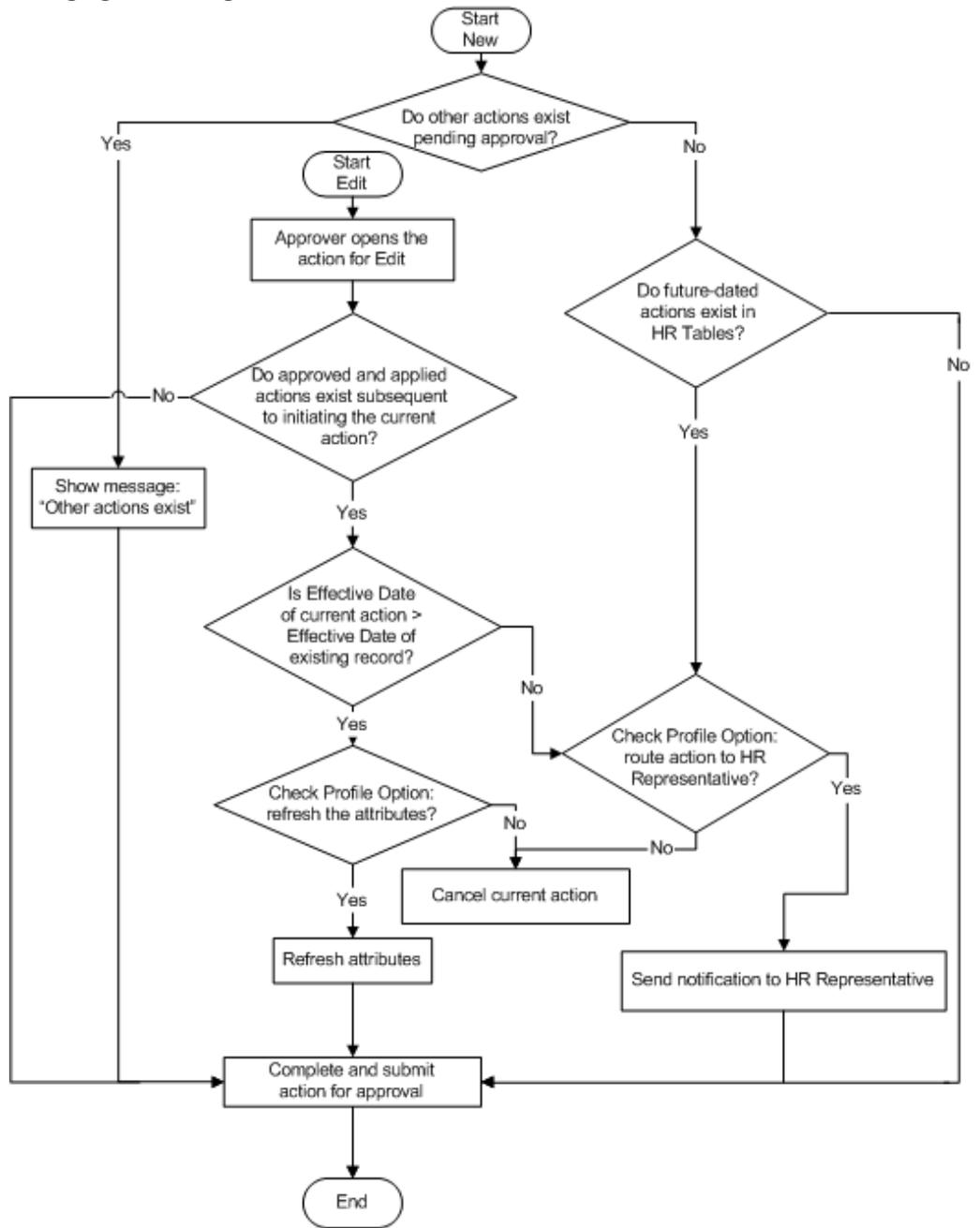
## Process Flow

No automated system can resolve every scenario involving conflicting data. In some cases, an HR representative applies all appropriate changes manually. On the whole, managers prefer to get their actions in process and approve them. Your configuration accommodates most scenarios automatically by setting the following options:

1. Refresh your action with valid information as of your effective date, or require that your action fail on final approval (intervening actions)
2. Allow approval of your action with subsequent routing to an HR representative, or terminate it with an error (future-dated actions)

The process flow diagram below describes in greater detail how the application manages data conflicts when intervening or future-dated actions exist. The figure assumes that concurrent transactions are allowed.

## Managing Conflicting Actions



**Note:** If an action has an effective date matching that of an existing change, the application assumes it to be a correction to the existing record.

For more information about date tracking in Oracle HRMS, see the Oracle white paper,

*How Date Track Works*, available on Metalink.

## Initiating a Self-Service Action

Oracle delivers a powerful and flexible set of tools in self-service actions. Your implementation team has many options to choose from as it decides which features are available, and how your process flow looks and feels. The following sections describe how to initiate an action, and possible exceptions resulting from implementation choices.

### Enter Process Page

Begin a self-service action by opening a list of persons from the Main Menu.

Your implementation team chooses to display a supervisory hierarchy of your direct reports and subordinates, or a position hierarchy. You can also select a MyList view, displaying people you choose. Your implementation team determines whether the hierarchy or MyList view is the default. View options include expanding and collapsing nodes on the tree, and focusing on one person and his or her subordinates.

**Note:** HR representatives typically use the MyList view to display people for whom they are responsible.

Your implementation team also determines whether multiple assignments appear in person/assignment combinations, and whether contingent workers appear.

Advanced Search criteria enable you to refine a person search by specifying criteria such as business groups, person types, department, or position.

To request a change, choose the Action icon associated with a person. The Actions page appears.

**Note:** From any person/assignment row, you can optionally choose a Details icon that provides information about that person and assignment.

### Navigation Options

Your implementation team may choose to display preselected actions on your Main Menu, consistent with older versions of SSHR. Oracle recommends that you open your person list by selecting Manager Actions from the Main Menu. From this single point of entry, you can see all available actions, and the selected person's eligibility for them. With preselected actions, you restrict yourself to the single action you have selected. If your selected person is ineligible, and your setup does not allow processing ineligible actions, you may have to begin again with a new action.

**Note:** Some processes are only available via preselected actions, such as New Hire or Organization Manager.

## Selecting an Action

If you use Manager Actions to enter the process, the Actions page lists available changes, and the selected person's eligibility for them. Pressing the Start button initiates the selected action, and the Effective Date page appears.

**Note:** If you use a preselected action from the Main Menu, and no pending actions exist for your selected person, the application skips the Actions page and takes you directly to the Effective Date page.

## Eligibility Processing

Your implementation team can configure the application to determine your selected person's eligibility for a proposed action automatically. The application determines eligibility as of the effective date you specify, and displays the results in a table on the Actions page. Eligibility determination is based on personal, employment, or derived-factor criteria, such as Job, Organization, or Length of Service. The process also considers department- or locality-specific criteria to determine eligibility for actions such as Promotion (Sales), or Hire (France).

Infrequently, the selected person may be eligible for more than one version of an action, such as Promotion (Sales) and Promotion (US). In most cases, well-configured eligibility processing will present only one action as a choice. If the person is eligible for more than one version of an action, you select from a list of choices on the Sub-Actions page.

Your implementation team can configure the application to process ineligible actions. For example, you can do this if approvers have the right to override eligibility criteria, or if you want to put an action in process for a person who is not eligible as of the effective date, but may become eligible later.

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

## Processing Your Action

When processing your action, you need to know how the application manages data conflicts. If your implementation team has configured the application to support concurrent actions, you may encounter messages and warnings about other pending actions on the selected person's record, or actions on this person you have saved for later. The Actions page displays two lists of pending actions on the selected person:

- your own actions

- actions awaiting the approval of others

You can also see a complete list of your own pending actions by choosing Actions Requiring Your Attention from the Main Menu. The application may also encounter intervening or future-dated changes that affect a proposed change, some of which may appear after your action is in the approval process.

See: Managing Conflicting Actions, page 2-131

## Effective Date Page

Initiating or approving an action typically begins on the Effective Date page, where you choose one of two options:

1. Enter an effective date manually
2. Specify that the action takes effect on approval

This page also provides information and warnings relating to your action, such as the earliest possible effective date, or other approved or pending actions on this person.

**Note:** If your implementation team decides to have all actions take effect on approval, the Effective Date page does not appear.

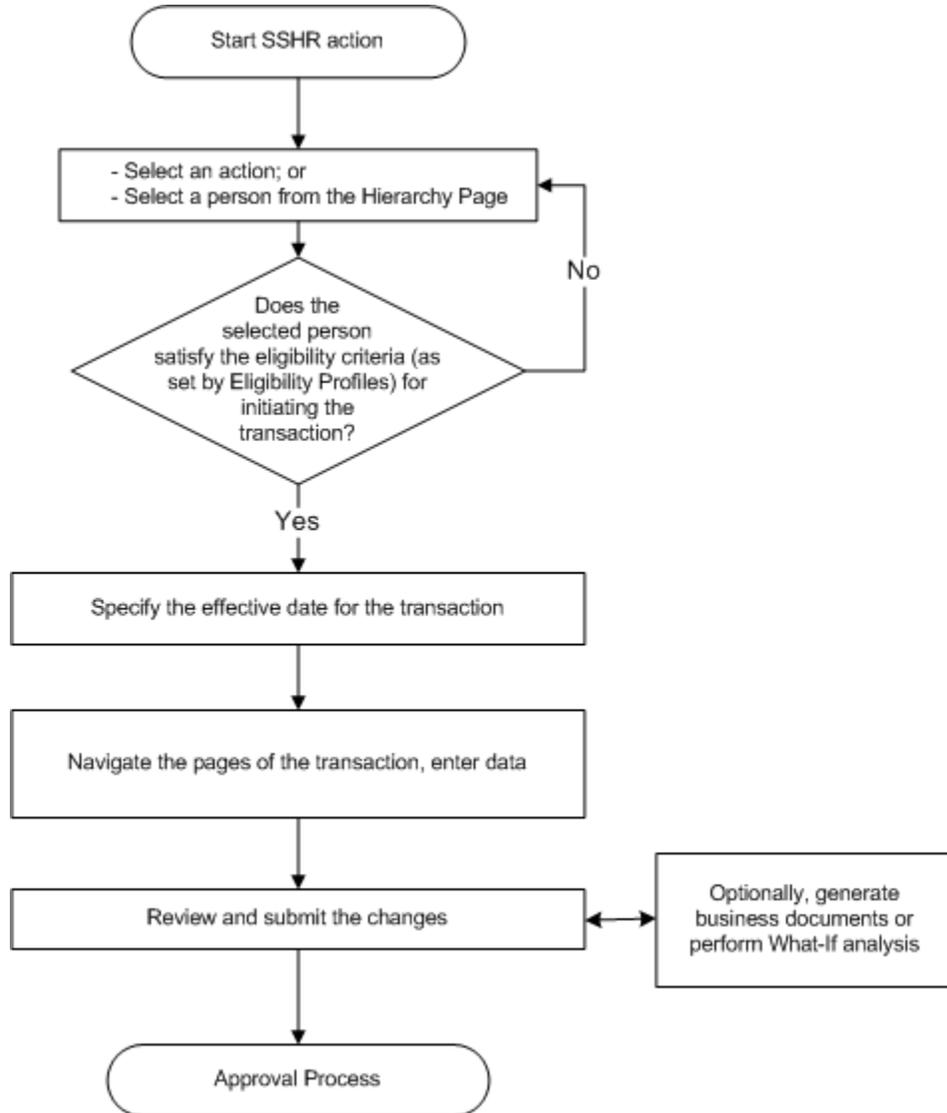
## Business Process

Here you enter data related to your action. Available actions may differ, depending on the business processes your implementation team has provided. Examples include:

- Hire a person
- Change location
- Change manager
- Change grade
- Change salary
- Change job
- Change hours
- Award bonus
- Release information for transfer

- Initiate Leave of Absence
- Termination

### SSHR Actions



### Save for Later

If you Save for Later at any time in the process, you receive a notification as a reminder. If you inadvertently close your browser, or your browser crashes, the application saves your action for you.

## Canceling an Action

If you are the Initiator, pressing the Cancel button deletes the action. If you are an approver, or have Saved for Later, Cancel reverts to the previously saved data.

## Review Page

In addition to displaying the proposed changes to the person's record and information about the approvers on the chain of recipients, the Review page gives you the opportunity to choose additional approvers, or add people to notify. Other available features include:

- Attachments
- What-If Analysis
- Document Management
- Approvals Management

Press the Submit button to send your action to the next approver on the chain. If you are the final approver, you submit the changes to the database.

## Attachments

The Review page includes an Attachments link, which enables you to attach supporting documents, such as a photograph, a copy of a degree or certificate, or a resume. You need update privileges to do this. Oracle does not predefine any document types, so your implementation team supplies the list of available types.

## "What-If" Analysis

If you choose the What-If Analysis link on the Review page, the application displays information about your selected person's entitlement to compensation and benefits. Choosing this link runs the BENMNGLE process, which gathers and reports information about compensation objects relating to the person's entitlements. Use this page to assess the impact of your proposed action. Here you can review the unit of currency, current amount, current period, What-If amount, and What-If period.

**Note:** Performing What-If analysis requires that you run Oracle Advanced Benefits.

## Business Documents

Your implementation team can create formatted business documents in Acrobat PDF

format, and associate them with selected actions. The application can also include information from your action in the document automatically. For example, documents available for your use could include a Request for Change, Notification of Change, letter, or contract describing the changes to the person's status, such as a new job or effective date. Your setup can provide pre-approval and post-approval versions of a document. If you press the Printable Page button on the Review page, you will see a list of pre-approval documents associated with your action that are available for printing. If no documents are available, pressing Printable Page displays a printer-friendly version of the Review Page.

On final approval, the Initiator receives a notification with a link to a list of available post-approval document versions.

## Approving a Self-Service Action

### Approvals Management

SSHR actions use Oracle Approvals Management (AME), a rules-based expert system, to route actions via supervisory hierarchy (default), or routing list. Your implementation team can define business rules that generate a routing list automatically, ensuring that SSHR routes your action to the appropriate parties for approval. Your setup can designate approvers who record decisions by external authorities, such as unions or workers councils.

Pressing the Submit button on the Review page sends your action to an approval process that chooses the appropriate approvers automatically. Approvers receive a notification in their Worklist with a link to open the action, and (with update privileges) they can edit, change the effective date, or attach supporting documents. Approvers can return the action for correction to any previous approver on the chain. If you are the final approver, pressing Submit applies the action to the database.

**Note:** If the database encounters intervening approved actions on your selected person, workflow sends the action to a Human Resources representative on final approval for manual entry of all appropriate changes. You see a warning message if this is the case.

See: [Managing Conflicting Actions](#), page 2-137

The Review page also provides options to add approvers and select additional notification recipients.

### Notifications

Workflow users receive notifications in their Worklist. Standard formats include:

- Approval Required

- Saved for Later
- Return for Correction
- FYI
- Queries from other approvers

When an approver or HR representative retrieves a notification requiring approval, the Notification Details page appears, providing notes and warnings related to the action. Notification Details provide the following options:

- Approve
- Reject
- Reassign
- Request Information
- View Action
- Update Action
- Return for Correction

Most options include an opportunity to provide comments or ask questions.

## Updating an Action

Unless your implementation team has decided to have all actions take effect on approval, the Effective Date page appears when an approver opens an action. Any approver in the chain of recipients with update privileges can change the effective date here. Approvers may see messages or warnings about intervening or future-dated actions that the database has encountered. See *Managing Conflicting Actions*, page 2-137

## Return for Correction

Any approver can return an action for correction to any previous approver on the chain. In order to make a change, recipients must have a workflow role that grants update privileges.

# Workforce and Applicant Termination

## Workforce and Applicant Termination

Every enterprise needs to be able to terminate employees, contingent workers, and applicants.

### Terminating an Employee or Contingent Worker

When an employee or contingent worker leaves your enterprise you terminate them. Oracle HRMS enables you to terminate an employee or contingent worker by entering a termination date. This is the minimum amount of information required for a termination. You can record further information, including:

- Reason for termination (including death)
- Date notified (employees only)
- Final payroll processing date (employees only)
- Terminated user person type
- Terminated assignment status (employees only)

See: Ending Employment, page 2-151

See: Ending a Placement, page 2-153

### Terminating an Employee or Contingent Worker with Multiple Assignments

If your organization uses multiple assignment functionality, you should take extra care when terminating an employee or contingent worker. If assignment-level security is enabled, you should only terminate an employee or contingent worker if you have access to the primary assignment for that person. To avoid the situation where a manager without access to the primary assignment terminates a person, Oracle recommends that you carry out the termination process in Self-Service Human Resources (SSHR) using the Self-Service Actions functionality.

For more information on security, see: *Assignment-Level Security, Oracle HRMS Configuring, Reporting, and System Administration Guide*

For more information on the Termination process in SSHR, see: *Termination, Oracle SSHR Deploy Self-Service Capability Guide*

### Terminating an Assignment

Each employee and contingent worker in Oracle HRMS must have at least one active

assignment.

If a person has more than one active assignment, you can end any of their individual assignments by selecting an assignment status of End or Terminate Assignment for employees, or an assignment status of End for contingent workers, in the Assignment window. (For employees, the assignment status End ends the assignment immediately. The assignment status Terminate Assignment leaves the assignment effective but changes its status from Active to Terminated.) At least one assignment (the primary assignment) must remain active. If you want to end all assignments at the same time (or end the primary assignment), you must terminate the employment or placement, otherwise a warning is displayed.

**Mexico only:** When you terminate an employee, or an employee's secondary assignment, you must provide a Social Security Leaving Reason.

If you use Oracle Payroll, you can choose to include the employee assignment in a payroll run after the assignment has ended.

See: *The Employee Assignment, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See: *Ending an Assignment*, page 2-116

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

## Terminating an Application

When you reject an application for employment you terminate the application. Oracle HRMS enables you to terminate a single application from an applicant with multiple applications or terminate all outstanding applications for an applicant. You can terminate applicants even if future changes, such as application status updates, exist for the person after the proposed termination.

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

If you want to terminate all applications for an applicant you can do this by entering a termination date. This is the minimum amount of information required for this type of applicant termination. You can choose to record further information including:

- Reason for rejecting the application
- Terminated user person type
- Terminated applicant status

See: Rejecting an Application, page 1-20

You can also use Oracle HRMS to trigger the generation of a formal rejection letter.

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

## Canceling a Termination

There are a number of reasons why you may want to cancel a termination for an employee or contingent worker. For example, an employee may decide not to leave, the date of leaving may change for a contingent worker, or you may have terminated an employee or contingent worker in error. In each of these cases Oracle HRMS enables you to cancel or *reverse* a termination.

See: Canceling a Termination, page 2-154

## Ending Employment

If an employee is leaving your enterprise or agency, you *terminate* them in the Terminate window. The ex-employee's records remain in the application. You can reinstate, or rehire, the person to create a new period of service.

Many Oracle Applications work with employees as of dates in the future. This means any future date terminations you enter here are reflected, and the employee with the future dated termination are not available in such cases. You should take this into account when dealing with terminations where the end date is a sensitive piece of information.

The Final Process date is the last date on which you can process payments for a terminated employee, if you are using Oracle Payroll. To process unanticipated late payments or to make corrections, you can change the Final Process date, provided the new date does not conflict with other information held for the employee.

See: Updating an Employee's Final Process Date, page 2-155

**Note:** If you perform a *back-to-back* rehire, an ex-employee person type is not recorded for the employee's first period of service. This is because there is no period of time when the employee exists as an ex-employee.

See: Rehiring an Ex-Employee, page 1-28

You can also reverse a termination reinstating elements assigned to the employee prior to termination action being taken.

See: Canceling a Termination, page 2-154

**Note:** If you mistakenly add someone to the application, or if you want to remove all records for an ex-employee, you can *delete* the person in

the Delete Person window. However, you cannot delete an employee whom Oracle Payroll has processed in a payroll run.

See: Deleting a Person from the System, page 2-47

If you mistakenly hire an applicant, you can cancel the hire in the Person window.

See: Canceling a Hire, page 1-30

## Terminating an Employee

### To terminate an employee:

1. Enter the reason for the termination. You can define valid reasons as values for the Lookup Type LEAV\_REAS.

This is an optional step.

**Note:** When you enter a termination reason of "Deceased" and an actual termination date, if you have not entered an employee's date of death in the Other Information tabbed region of the People window, this date is set to the actual termination date.

**UK Payroll only:** If the employee is deceased, you must select the reason Deceased. This records the information on the P45. If the employee is retiring, you must select the reason Retirement. This automatically creates a retiree person record that can be used by your benefits department to trigger payments such as pensions.

2. Enter the termination dates. Only the Actual date is required. This is the date when the employee's person type changes. The Notified and Projected dates are for information only. The Last Standard Process date is the last date for normal processing, while the Final Process date is the last date for late payments.

For the Final Process date:

- If you need to process pay for the employee after his or her termination, set the Final Process date later than the Actual date, or leave it blank.
- If you do not need to continue processing, set the Final Process date to the Actual date.

**Note:** The Final Process field is enabled at all times, you can change the value subject to other information held for the employee.

The application closes the element entries on the Last Standard Process date, the Actual date, or Final Process date, depending on how you have defined the

elements.

3. **Canada only:** Click inside the Further Information field, and specify the ROE Reason and ROE Comment. The ROE Reason appears in Block 16 of the ROE. The ROE Comments appear in Block 18 of the ROE.
4. Select a terminated user person type in the Type field.

**Note:** The Type field is only enabled when the Actual date is entered for the first time. When you enable the Type field, it is populated by the default value for your system person type of Ex-employee.

Oracle HRMS assigns the person type you select to the person's record following termination. The person type is displayed as the Actual date plus one day.

5. Select a terminated assignment status in the Status field.

**Note:** The Status field is only enabled when the Actual date is entered, the Final Process has not been entered, or the Final Process date has been entered but is different to the Actual date. When you enable the Status field, it is populated by a default value.

Oracle HRMS uses the terminated assignment status you select for the primary assignment. This assignment status is displayed as the Actual date plus one day. If you update the primary assignment status, the Termination window still displays the status as the Actual date plus one day.

6. When the information is complete, choose Terminate to complete the termination.

## Ending a Placement

When a contingent worker leaves your enterprise, you end the period of placement in the End Placement window. This action changes the person type to Ex-contingent Worker and ends all assignments.

The ex-contingent worker's record remains in the database. You can reinstate the person to create a new period of placement.

### To terminate a contingent worker:

1. Select the termination reason.

**Note:** If you select the termination reason Deceased but have not completed the Date of Death field in the Other tabbed region of the

People window, that field is set to the actual termination date.

2. Enter the actual termination date.
3. Select a termination person type value.

**Note:** You enable the Termination Person Type field only when you enter the actual termination date. When you enable the field, it contains the value Ex-contingent Worker (or your enterprise's user name for this person type) by default.

4. Choose the Terminate button to complete the termination.

You can reverse a termination for a contingent worker.

See: Canceling a Termination, page 2-154

If you mistakenly add someone to the database or you want to remove all records for an ex-contingent worker, you can delete the person in the Delete Person window.

See: Deleting a Person from the System, page 2-47

## Canceling a Termination

If an employee or contingent worker decides not to leave, or the date of leaving changes, you can cancel a termination. You can cancel a termination at any time provided you have not rehired or started a new placement for the employee or contingent worker.

Oracle HRMS reopens the assignments previously closed down and gives each assignment the status it had before termination. It also restores other information to its state before termination. For example, it removes the end date put on recurring element entries for the assignment. Also, when you terminate an employee or contingent worker, future-dated changes on the assignment are not removed. This means that when you reverse a termination, Oracle HRMS reinstates the elements assigned to the employee or contingent worker prior to termination action being taken.

**Note:** Any nonrecurring element entries that were deleted for processing periods after the termination date cannot be automatically restored. You must restore them manually.

### To cancel a termination:

1. Choose the Reverse Termination button in the End Employment or End Placement

window.

**Note:** The application clears and disables the Type and Status fields in the End Employment window and the Termination Person Type field in the End Placement window.

#### **To change the termination date:**

1. Cancel the termination by choosing the Reverse Termination button in the End Employment or End Placement window.
2. Enter a new actual termination date and choose the Terminate button.

## **Updating an Employee's Final Process Date**

You can change an employee's Final Process date, subject to the following conditions:

- The Final Process date must be later than the Actual and the Last Standard Process dates.
- You cannot change the Final Process date to earlier than completed payroll actions.
- You must specify a value for the Final Process date if the employee has a later period of service.
- If you previously entered a Final Process date equal to the Actual or the Last Standard Process date, you cannot change the Final Process date to later than the Actual or the Last Standard Process date.
- If you previously entered a Final Process date later than the Actual or the Last Standard Process date, you cannot set the Final Process date equal to the Actual or the Last Standard Process date.

**Note:** If you must set the Final Process date equal to the Actual date since the employee has no activity or assignment between the two dates, the best practice is to reverse terminate the employee and terminate with the new dates. You can follow the same practice to change the Final Process date to later than the Actual or the Last Standard Process date (after previously entering them equal).

If you increase the Final Process date, the end date of the terminated assignment is automatically extended. If you make changes to the terminated assignment between the Actual and the Final Process dates, the latest date to which you can decrease the Final Process date is one day after the last change. For example, if the Actual date is April 10 and the Final Process date is April 15, and you make a change to the assignment on

April 12, the latest date to which you can decrease the Final Process date is April 13.

**US and Russian Payroll Only:** If you rehire an employee before the Final Process date for their previous period of service, the employee has overlapping periods of service between the rehire date and the Final Process date. You cannot change the Final Process date to earlier than or equal to the Hire date for the next period of service since this causes a gap between the overlapping periods of service. Similarly, for non-overlapping periods of service, you cannot change the Final Process date to later than or equal to the Hire date of the next period of service since this causes the periods of service to overlap.

Use the Terminate window to update an employee's Final Process date.

**To update an employee's Final Process date:**

1. **US and Russian Payroll Only:** If you rehired the employee before the Final Process date for their previous period of service, the Terminate window displays the service dates for all the overlapping periods of service. The dates for the latest period of service appear by default. Scroll down for the earlier periods of service.
2. Enter a new Final Process date.
3. Click Save to apply the changes

# Entering Contact Information

## Contact Information Overview

Oracle HRMS enables you to record the ways in which you communicate with the people in your enterprise and the people whom they have a relationship with, such as an employee's partner.

## Entering People as Contacts

You enter people as contact records to identify:

- People to contact in an emergency
- Dependents of the employed person
- Beneficiaries of certain benefits, such as insurance policies or stock purchase plans
- Individuals who receive a wage attachment payment

## Entering Contact Information

Entering contact information includes entering contact details for the people in your enterprise, such as their home address. As an employer, you need to record contact details so that you can contact people either by email, phone, fax or post, and for reporting purposes. For example, in the Netherlands you must record a person's house number for social insurance reporting.

## Entering Addresses (Address Window)

You can enter as many addresses as necessary for each person, using the Address window.

**Note:** You cannot enter or update address information in the Address window for a contact who is also an employee or contingent worker. Instead, update the relevant employee or contingent worker record.

### To enter an address for a person:

1. Select a national address style and click in the Address field.

If a local address style exists for your country, it is displayed as the default. Otherwise, the international style is displayed.

**Dutch Users:** When you record foreign addresses, ensure you use the Dutch International address style. This address style enables you to report the address in the wage report in the required format.

**US and Canadian users:** There is a choice of US address style and International address style if you have Vertex geocode data installed. If you are not maintaining DTW4 data and do not want to enforce the strict tax validation, then you can disable this using the HR:Enable DTW4 Defaults profile option.

**Singapore Users:** When you record addresses for local employees, ensure you use the Singapore (Formatted) address style. This address style enables you to report the Primary address in the IRAS reports in the required format.

**Note:** You can change existing address styles or create new ones if required. See: *Changing Default National Address Styles, Oracle HRMS Configuring, Reporting, and System Administration Guide*

A window opens with the address format for the country you select.

2. Enter your address information in this window.

**Note: India Users:** If the city is Delhi, New Delhi, Mumbai, Bombay, Kolkata, Calcutta, Chennai, or Madras, the application sets the metro status to Yes, else it is set to No.

**Note:** Use the Phone Numbers window instead of this window to record telephone numbers otherwise you will be maintaining two lists of numbers.

**Kuwaiti users:** You must select the Governorate (Muhafazat) for payroll processing.

See: *Adding Telephone Information, page 2-164*

**Dutch users:** Ensure you enter house number information for the Notification Social Insurance (NSI) reports. Use the House Number Addition field if your house number contains an alpha value. For example, if your house number is 5a, enter 5 in the House Number field, and a in the House Number Addition field. See the following topic for information on the NSI reports:

See: *Social Insurance Reporting, Oracle HRMS Payroll Processing Management Guide*

**Note:** You must enter the postal code in the following format NNNNAA, for example, 1234AB.

**Russian users:** Ensure you enter the zip code for the Residential address category

so that the code appears in statutory reports.

3. Choose the OK button. This returns you to the Address window.
4. Select an address type, such as home, or weekend, or business. You can only have one address of each type at any time.

**Singapore Users:** If you use company quarters, be sure to choose this address type, so it appears in the A8A report.

5. Check the Primary checkbox to identify the person's main address. Otherwise, leave blank. By default, the first address you enter is the Primary address.

**Dutch users** - Use the Population Register Address type to record an additional address. The NSI reports use this information to report to the Dutch population register.

Only one address at any time can be a person's Primary address.

**Singapore Users:** If you use the Singapore (Formatted) address, you must enter the block number or address number, the street name, and the postal code values within the address to ensure that the IRAS process validates correctly. If you enter the Unit Number, you must enter the Level (Floor) number in the XXX-XXXXX format.

6. Save your work.

#### **To update the primary address:**

1. Enter an end date for the existing primary address.

Do not save.

2. Create the new primary address starting the next day and check the Primary Checkbox.

**Note:** An employee must always have a primary address, but you cannot enter more than one primary address for the same time period.

3. Save the new primary address.

#### **To change from an international to a local address style:**

1. To change from a global (international) address style to a local address style, choose Change Global Style to Local. This button appears only when the current style is international.

The Personal Address Information window appears showing the new address

structure. Values in fields common to both styles appear in the new structure.

If you choose Change Global Style to Local when there is no local style, Oracle HRMS displays an explanatory message and the style remains unchanged.

2. Complete the address definition, as appropriate.
3. Choose OK.
4. Save your work.

## Adding a City to the Database

If you are entering the address of someone living in a city or town not in the database, you must add the city or town using the Cities window. You are likely to find that cities or towns with a population of less than 250 do not exist in HRMS unless your enterprise has added them already.

### US Only:

After applying the Vertex update and before applying the Oracle Quarterly Statutory Update, you use the Cities window to enter data that creates new Geocode and JIT data. Examples of the data you enter include cities, counties, school districts and zip codes. Oracle Payroll creates user-defined cities with a city code of Uxxx for geocodes with no tax implications, and creates user-defined cities with the state, county and city codes defined by Vertex for geocodes with tax implications.

See: Geocodes, *Oracle HRMS Payroll Processing Management Guide*

See: Adding New Tax Information for an Existing Geocode,

**Note:** For US Federal HR, if your agency uses the National Finance Center (NCF) as a provider, do not add cities. NFC implementations use predefined values for cities based on duty stations.

### To add a city for an address:

1. In the State Name field, select the name of the state or territory in which the city is located. For Canadian cities, select Canada in this field.
2. In the County name field, select the county in which the city is located. For Canadian cities, select the province in which the city is located.
3. Enter the city name in the City Name field.
4. If there is a single zip or post code for the city, enter it in the Zip Start field and leave the Zip End field blank.

5. If a range of zip or post codes applies to the city, enter the first code of the range in the Zip Start field, and the last code of the range in the Zip End field.
6. Save your work.

## Entering People's Addresses at Sites with Oracle Payroll

Oracle Payroll uses employees' primary addresses to maintain federal, state and local tax rules for employees subject to US taxes. Therefore, these employees must have on record **at all times**, one and only one correct, primary US address with an open end date, that includes a valid city, state, zip code and county. This means that sites including Oracle Payroll must enter a new employee's primary address using a date no later than the employee's hire date.

The **US-specific address window** appears on the menu at sites including Oracle Payroll accepts and fully validates entries of city, state, zip code and county for US addresses, and entries of city, province and post code for Canadian addresses. It is very convenient to use, because entry of only a zip or post code automatically brings up the city, county and state, or city and province, to which the zip or post code applies.

The Taxation Address region in the US-specific window allows you to enter an alternate address for payroll taxation purposes only. Use this region only if you want to override the primary mailing address used by Vertex.

**Note:** This region allows you to enter accurate information for employees whose mailing address differs from their taxation address. This region also supports Indiana county tax legislation which requires an employee who changes their primary address to be taxed at the old address for the remainder of the calendar year. In this instance, Oracle Payroll enters the old address into the Taxation Address region, and clears the fields in the region every January 1st.

By default, the first address you enter for someone becomes the primary mailing address. There is no limit on the number of secondary addresses, such as weekend or summer addresses, you can enter for a person.

### Foreign Secondary Address Entry

If you often enter foreign secondary addresses, ask your system administrator to add the **generic address window** to your menus. This window permits you to select the correct address style for any country when making entries.

See: Entering People's Addresses at Sites without Oracle Payroll, page 2-163

**Note:** At sites with Oracle Payroll, the generic address window does only standard validation for all but one national address style. For the

US address style, it does the same full validation as entries made in the US-specific address window. However, it is more efficient for users at sites with Oracle Payroll to use the US-specific Address window to enter US and Canadian addresses.

### US and Canadian Address Entry

When entering US or Canadian addresses for employees and their contacts, use the US-specific Address window.

Cities or towns with populations of 200 or less may not be included on the lists for US and Canadian address validation; if not, you must enter them in the database. To check whether a city or town name is in the database, query it in the Cities window.

#### To enter a US or Canadian address with full validation:

1. Set the effective date to the date the address takes effect.
2. In the Address lines, enter the street name and number, and any related information such as building name or apartment number.
3. If you know the US zip code or Canadian post code, enter it in the Zip Code field. This restricts the list of cities to those valid for the post code. You can then select this additional address information from short lists.

**Note:** For Canadian addresses, CN (for Canada) always appears in the State field, the province name appears in the County field, and the post code appears in the Zip Code field.

4. If you are unsure of the zip or post code, enter the city name. For US addresses, this restricts the lists of states, counties and zip codes to those valid for the city. For Canadian addresses, this restricts the lists of provinces and post codes to those valid for the city. You can then select this additional address information from short lists.
5. If you are unsure of both a zip or post code and the city name, for a US address enter the two-letter state abbreviation. This restricts the city, zip code and county lists to those valid for the state. For a Canadian address, enter CN in the State field. This restricts the city, post code and province lists to Canadian entries. Then select the additional address information.
6. Optionally, enter telephone numbers and select the address type. Check or uncheck the Primary box as required. Notice that a person must have a primary address on record before you can enter any secondary addresses for him or her.
7. If you know the last date this address will be effective for the person, enter it in the

Date To field.

8. If you wish to override the actual address of the employee for taxation purposes, enter an Override Pay Tax Address.

**Note:** For employees in Indiana who lived in the state on January 1 and change addresses mid-year, Oracle Payroll enters this override automatically.

9. Save your work.

#### **To change an address:**

1. Query the address record you want to change.
2. Enter the last date the address will be effective for the person in the Date To field.
3. With the cursor in the Address lines, hit the down arrow and follow the procedure above to create the new address.

## **Entering People's Addresses at Sites without Oracle Payroll**

All employees must have one (and only one) primary address on record at any point in time, but can have an unlimited number of secondary addresses (such as Summer or Weekend).

To enter all primary and secondary addresses for employees and their contacts at Oracle HR sites that do not include Oracle Payroll, you use the **generic Address window**. This window permits you to select address styles appropriate both for the US and Canada, and other foreign countries as well.

It performs standard validation of field entries (for example, for zip code length), but this is no special validation of city or county names, zip codes, or other address elements.

#### **To enter a generic address:**

1. Select a national address style.

A window opens with the address format for the country you select.

**Note:** Default address styles are predefined for many countries. You can change these defaults and can create address styles for other countries.

2. Enter address information in this window and choose the OK button to return to

the Assignment window.

The first address entered for someone is, by default, the primary address.

3. Select an address type, such as Summer or Weekend.
4. To identify the person's main address, check Primary. By default, the first address you enter is the Primary address.

At any time, only one address can be a primary address.

#### **To change an address:**

1. Query the address record you want to change.
2. Enter the last date the address will be effective for the person in the Date To field.
3. With the cursor in the Address lines, hit the down arrow and follow the procedure above to create the new address.

## **Adding Telephone Information (Phone Numbers Window)**

You can enter multiple telephone numbers for people in the HRMS database. To enter telephone information for a person, use the Phone Numbers window.

**Note:** You cannot enter or update telephone information in the Phone Numbers window for a contact who is also an employee or contingent worker. Instead, update the relevant employee or contingent worker record.

#### **To enter a telephone number:**

1. In the Type field, select the type of the telephone device. For example, Office, Home or Fax.
2. In the Phone Number field, enter the telephone number. You can use any format for the telephone number unless specific instructions are listed below for your legislation.

**US Users:** You must enter telephone numbers in one of the following formats to ensure they are included correctly on the US Magnetic Reports (for example, the State Quarterly Wage Listing).

- 222-333-4444X55
- 222-333-4444Ext555

- 222-333-4444-555

Any format is allowed.

3. In the From field, select the start date for the telephone number.
4. In the To field, optionally select the date when the telephone number is no longer valid.
5. In North America, optionally add the extension number in the last field.
6. Save your work.

If you want to maintain a history of telephone numbers for this person, be sure to add a new entry for the new telephone number and enter an end date for the existing telephone number. If you do not want to maintain such a history, simply change the information for the existing telephone number.

**Note:** You can only have one active record for numbers with the types Home or Work. To add a new record for these types you must end date the existing record and begin a new record on the following day.

## Running the Invalid Address Report (US)

The Invalid Address Report (US) identifies employee records that contain no address, for example, or that do not contain an address for an entire period of service. The report can also identify employee addresses that exceed the Social Security Administration (SSA) MMREF-1 line length (the length acceptable for electronic filing of W-2 statements) or a line length you specify. The report does not identify invalid contingent worker or applicant addresses.

Run the Invalid Address Report (US) from the Submit Request window.

### To run the Invalid Address Report (US):

1. In the Name field, select Invalid Address Report (US).
2. Enter start and end dates for the report. Oracle HRMS validates addresses of employees employed at any time in the specified period.
3. Select a Government Reporting Entity (GRE). If you leave this field blank, Oracle HRMS validates addresses in all GREs in the current business group.
4. In the Additional Verification field:

- Select MMREF to check whether employee addresses comply with SSA MMREF-1 standards.
- Select Length to identify employees with addresses containing address lines longer than a specified number of characters.

If you select None, Oracle HRMS performs no additional address-length checking.

5. If you select Length in the Additional Verification field, enter the maximum address-line length in the Line Length field. Oracle HRMS writes a message to the report log identifying any employee whose address contains at least one address line longer than this value. You can edit such addresses manually to reduce their line length.
6. Click OK.
7. Click Submit.
8. The application displays the concurrent request ID.

## Entering Communication Delivery Methods

Within your enterprise you can contact your employees and applicants in a number of ways. For example, you could use E-Mail, Voice Mail, Fax or Post. Using the Communications Delivery Method window you can enter the different methods of contacting a person and indicate the method they prefer.

### **To enter a communication delivery method for a person:**

1. Enter the methods of delivering information in the Delivery Method field. You can enter as many communication delivery methods as necessary.
2. Optionally, enter the period the delivery method is valid using the start and end dates. Otherwise, the start date is the effective date and the end date is not set.
3. Select a preferred communication delivery method, if your employee or enterprise prefers a particular form of communication. Each employee or applicant can only have one preferred communication delivery method.
4. Save the communication delivery methods for your employee or applicant.

## Entering Next of Kin and Other Contacts

Use the Contact window to hold information about contacts, for example:

- People to contact in an emergency.
- Dependents.
- Beneficiaries of benefits such as insurance policies or stock purchase plans.
- Individuals receiving payment of a wage attachment/third party payment deducted from the employee's salary.

A person entered as a contact can be one, some, or all of the above.

The coverage start date for an employee contact, is the employee hire date or the contact relationship start date, whichever is later. This can be important in benefits processing, where eligibility for certain benefits starts from the start date of a contact relationship.

### **Creating The Same Contact Relationship More Than Once**

You can set up the same relationship more than once between the same two people. However, these relationships must not occur in the same time period. For example, you can set up that Person A married Person B from 01-Jan-1990 to 01-Feb-1991. Person A could then marry Person B again, starting from the 02-Feb-1991. However, you cannot enter that the couple remarried on 01-Jan-1991, as this would mean that they were married twice in the same time period.

### **Updating a Contact Relationship Start Date to Make it Earlier**

You can update the contact relationship start date between two people, creating a supplementary record to cover the additional period.

For example, Person A exists on the application as an employee with a hire date of 01-Apr-1990. Person B exists on the application as a contact, with a creation date of 01-Jun-1990. Person A then marries Person B on 01-May-1990. As the application holds a contact coverage start date of 01-Jun-1990, a new contact record is entered to cover 01-May-1990 and 31-May-1990.

### **To enter a contact:**

1. Do one of the following:
  - Enter the name of a new person.
  - Select from a list of people already entered on the system.
2. If you enter a new person:
  - Enter their gender and date of birth.

**Important:** For UAE users only, also enter the father, grandfather, and family name.

- Select the user person type.  
You can only select user person types which are set up for the system person type of Other, for example contact.

3. Enter details about the different contacts for your employee in the Contact Relationship fields.

### **To enter contact relationships:**

1. Select the contact relationship, for example child or spouse.
2. Enter the start and end date (if known) of the relationship.

**Note:** For Dutch users only, if you set up a spouse as a contact for an employee, whose full name format includes partner's prefix and surname, the full name of the employee changes automatically based on the spouse's name, if the contact relationship covers the employee's full period of employment. If it does not cover the full period the changes to the full name of the employee must be set manually on all datetrack records.

3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end reason for the relationship.
4. Select whether the contact:
  - Is the primary contact.
  - Is the recipient of a third party payment (for example, from a court-ordered deduction/wage attachment).  
This enables you to select this person on the Personal Payment Method window when entering a third party payment method for the employee.
  - Shares the same residence as the employee.
  - Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependent and/or beneficiary.
  - Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.
5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the

employee's record.

For example, Person A has a relationship type of spouse with Person B. This is given the sequence number of 1. Person A also has a relationship type of father to Person C. This is given the sequence number of 2.

Person A also has a relationship type of emergency contact with Person B. This must also have the sequence number of 1 as a relationship between these two people is already recorded against Person A.

Person B is also an employee and therefore has her own set of contacts recorded against her. She has a relationship type of spouse with Person A. However, this relationship does not have to have the same sequence number as the relationship recorded against Person A, that is, this relationship has a sequence number of 5.

6. Select whether you want to create a mirror relationship and enter the mirror relationship type.

**Important:** You can only enter a mirror relationship and type when you first create the contact. Once the mirror relationship is saved, the relationships are maintained independently of each other, except for mirror relationships that are created automatically.

Oracle HRMS automatically creates a mirror relationships when you enter a spouse, parent or child. For example, if you create the spouse relationship from person A to person B, when you query person B in the Contact window, a mirror relationship of spouse to person A is automatically created.

Furthermore, if you update a relationship that has had a mirror relationship automatically created, the mirror is also updated accordingly. For example, if you end date the relationship of spouse for person A, the spouse relationship for person B is also ended. If the relationship type is changed the relationships become independent.

7. Enter further information about the contact if your localization team has setup the configuration of the further information field.

**For Spanish users only:** Record if the contact (disabled dependant or a dependant) is financially dependent on the employee. The application uses this information to calculate the tax reductions the employee may be eligible for. You can also record if the employee is a single parent as this affects the employee's the tax-withholding rate.

**For Russian users only:** If the contact type is child, indicate whether the child is in full-time education. The application uses this information to calculate the employee's tax reductions. You must also record any disability information for the child contact, as this affects an employee's social security contributions, tax, and leave benefits.

See: Entering Disability Information, *Oracle HRMS Enterprise and Workforce Management Guide*

8. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, page 2-37

### **What Next?**

If you want to enter addresses or phones for the contact, choose the Contact Details button.

# Using People Management Templates

## Template Windows User Interface

The following is an introduction to the windows that have been created from the example predefined templates. If you have been using the standard Oracle HRMS windows such as the People window, there are additional features that you need to be aware of:

- Configurable Find window
- Configurable Summary and Maintenance windows
- Graphical navigator
- Checklist tab
- Graphical timeline bar
- Actions button and Notify button

## Find Window

The Find window enables you to perform detailed queries to find a person or group of people you need to work with. You can enter queries using basic search criteria such as name. You can also use advanced criteria such as grade ranges, or combinations of criteria (for example Job is Sales Manager AND Organization is not Northern Sales).

The Find window expands to display the results of the find when you choose the Find button.

To edit a person's details, select the record and choose the Show Details button. You can save the query, results, or a selection of the results into folders so that you can access those people again without performing the search again. See: Saving Search Criteria or Search Results to a Folder, page 2-191 for more information.

The Effective Date field must contain a value. This date controls which values are displayed in lists of values. It can differ from the date set in the calendar. However, when you choose the Find button, the effective date is set to what was entered in the Find window. If you do not enter a date, the current effective date from the calendar is used.

**Important:** The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If

the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

See: Finding a Person or Group of People, page 2-177.

## Summary Window

The Summary window enables you to browse and select records from the database using the Data Organizer, which is the navigator on the left hand side of the window. You can select a Person, Assignment, or Application in the Data Organizer to see a summary of information in the Details region. This window only enables you to make changes to the checklist information on the Checklist tab. You cannot edit a person's details using this window.

## Data Organizer

There are three root nodes in the Data Organizer:

- People By Name (or People by Job, or People by Organization depending on what is selected in the View By poplist).
- Personal Folders, which you have created for your own use only.
- Public Folders, which have been created from the Find window and made public for everyone to see

### People By Name, Job or Organization

By expanding People by Name, you can see folders in alphabetical order containing all the people in your security profile. You can order the information in this branch by name, job, or organization.

## Personal Folders

There are two types of Personal folders:

- Search Criteria  
Search Criteria folders contain a query. They are dynamic. When you open the folder, the query is performed. This saves you re-entering commonly used queries in the Find window each time you need to use them.
- Group  
Group folders are static. They contain the groups of people you most commonly need to work with. You can create a Group folder by saving search results or pasting people in from other folders. People in a Group folder are sorted by name.

See: Saving Search Criteria or Search Results to a Folders, page 2-191

See: Managing Your Group Folders, page 2-178.

### Public Folders

Public folders are Search Criteria folders that have been made available to all users.

### Checklist Tab

The Summary and Maintenance windows can contain a Checklist tab. This contains checklist items set up by your system administrator to enable you to record the progress of tasks. For example, there might be a check to record that a job offer has been issued, along with a status and date.

**Important:** The checklist is only a visual reference and does not perform any actions.

### Actions Button

The Actions button on the Summary and Maintenance window enables you to perform tasks such as Activate Assignment or Hire Into Job.

The list of actions available depends upon the person type and their assignment status. For example, if you select an employee (not their assignment), the actions available are:

- Apply for Internal Vacancy
- New Assignment

If you select a contingent worker (not their assignment), an available action is:

- New Contingent Worker Assignment

If you select an employee or contingent worker assignment, available actions include:

- Make Primary Assignment
- Activate Assignment
- Suspend Assignment

If you select a secondary employee assignment, additional actions are available:

- Terminate Secondary Employee Assignment
- End Secondary Employee Assignment

### Notify Button

The Notify button on the Summary and Maintenance windows enables you to send workflow notifications to other people. For example, when hiring a new person, you

might need to send notifications to security to organize a new security card and to inform the system administrator to set up a new account. You select the notification message and the person or role to send it to. You can preview the notification before you send it.

The notification emails are displayed in the Workflow Notification Mailer. See Oracle Workflow for more information.

### Creating New Records

If you select People By Name, Job or Organization, you can also create new records. For example, you can create a new employee or new applicant depending on how the template restrictions have been set up. You can choose New from the toolbar or from the right mouse menu.

### Maintenance Window

The Maintenance window enables you to enter and update information. The Maintenance window can contain tabbed regions each holding logical groups of information. Choose a tab to view the information in it. This window also contains a timeline bar that you can use to navigate to specific points in time such as a future date or the date of the last change to a record.

### Correction or Update

The template window makes datetracked changes on a day-to-day basis in the same way as other datetracked windows. You can make datetracked changes to any of the fields on the window by using the option buttons to choose whether to update or correct information.

- If you choose *Correction*, Oracle HRMS overwrites the existing information.
- If you choose *Update*, Oracle HRMS records the date and change, and retains the original information.

If you are trying to update the record and the system will only let you make a correction, check whether your effective date is the date of the last change. You cannot record two updates for one day, so the system forces you to correct the last update.

**Important:** This interface only enables you to update or correct the latest information about a person or assignment. If there is a future change (after your effective date) to any personal information, all personal information fields are greyed out. Similarly, if there is a future change to any assignment information, all assignment fields are greyed out. To make complex retroactive changes to history, you must use the People and Assignment windows, where all the DateTrack modes are available for corrections.

## Using the Timeline Bar

The Maintenance window contains a graphical timeline bar. The timeline is color coded to help you see when changes happened. You can move to a new date either by scrolling forwards or backwards using the arrow buttons or by entering a date and choosing the Go button. You can also click in the DateTrack timeline to move forwards or backwards in time.

You can choose to view specific changes on the timeline by choosing from the poplist next to the timeline bar. For example, you can choose to view changes only for Last name. You can then use the arrow buttons to navigate to the first, previous, next, or last change made to this field.

**Note:** The fields listed in the poplist are defined by your system administrator in the template.

There can be a number of types of information included in the Maintenance window, depending on the template design, for example, personal information, assignment information, tax information. These types may have been updated at different times, so the date of the last update can vary depending on the type of information.

If a field is listed in the poplist next to the timeline bar, you can also view its DateTrack history by right-clicking on the field and choosing DateTrack History.

## Accessing More Field Information Using the Right Mouse Menu

Your system administrator may have enabled the display of more information for some fields. For example, on the Job field you might be able to display the normal working conditions. To view this information, right-click in the field and choose the appropriate option from the right mouse menu.

## Entering Employees Window

This window has been created using the pre-defined People Management template called Entering Employees.

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

- New employees
- Employment
- Office location
- Applicants

- Background checks
- Re-hire recommendations
- Further names
- Medical details
- Address details
- Telephone numbers
- Picture record
- Dependents, beneficiaries and other contacts
- Contracts

You can also use this window to update people's statuses, for example, from applicant to employee.

**Note:** The system administrator can create customized versions of this window so that you use each version for certain person types only or for certain functions only (entering employees, entering applicants, or hiring applicants).

## Folders for Saved Search Criteria or Results

You can save a query or the results from a query to folders so that you can quickly access the people you need to work with in future work sessions. The Find window in a template form enables you to do this. The folders are added to the Data Organizer on the Summary window. You can view the people in the Data Organizer by opening the correct folder. There are two types of folder you can use.

### Search Criteria Folder

This type of folder contains the search criteria for your query, such as "find all employees assigned to the Northern Sales organization". The actual results are not saved in the folder. This type of folder is dynamic because each time you open it, the query is performed again. So you always get the most up-to-date results displayed in the folder.

You can save folders into the Personal Folders branch and they will appear on the Data Organizer when you open the Summary window. You can also make these folders public so that other users can access them.

## Group Folder

When you perform a query using the Find window and the results are returned, you can save that set of results or a selection of the results in a group folder. When you open that folder in future, you will always see the same set of people even though some of the people may not meet the original search criteria when you look at the folder again.

You can build upon lists of people in group folders by copying and pasting people from one folder into another. For example, suppose you have two group folders containing a fixed list of people you regularly work with. You could cut the people from one folder and paste them into the other folder leaving you with just one folder to open. You can delete folders so you could remove the empty one.

**Note:** You cannot make group folders public.

See: Saving Search Criteria or Search Results to a Folder, page 2-191.

## Finding a Person or Group of People

If the Find window is not automatically displayed when you navigate to a template window, choose Find from the toolbar or from the View menu.

**Note:** You may have a template in which there is no Find window, depending on how the people management templates are configured at your site. If the Find option is not available, you must select a person from existing folders in the Data Organizer.

This window enables you to find a person or group of people to work with. The Details tab is displayed by default to enable you to perform a basic query. For more complex queries, you can choose the Advanced tab.

### To find a person or group of people:

1. In the Basic tab, enter the search criteria you want to query on. For example, enter the person's last name to find a person or enter a job title to find a group of people assigned to, or applying for, that job.

You can enter values in as many fields as you require. The search finds people who meet all the criteria you enter.

**Note:** The Effective Date determines the lists of values available on fields in the Find window and which records will be returned. The date you set here also sets the calendar date when you choose the Find button. So if you navigate to another window, the date is

carried over to that window. If no effective date is displayed, the Find window uses the calendar date, which you can see by clicking the Calendar icon on the toolbar.

2. Optionally, choose the Advanced tab and enter more search criteria.

For example, to find a person based on their grade, enter Grade is greater than on one line and Grade is less than on a second line. This restricts the query to a grade range.

3. Choose the Find button.

If you have entered search criteria in both the Details and Advanced tabs, the search finds people who meet both sets of criteria. For example, if you entered Northern Sales in the Organization field of the Details tab and a grade range in the Advanced tab, the search finds people assigned to the Northern Sales organization within that grade range.

The window expands to display your search results. The results are displayed in a folder so you can use the tools in the Folder menu to rearrange the columns, widen fields, and so on.

**Note:** Choose the Clear button to clear all fields if you want to enter new search criteria.

4. To edit a person's details, select the row and choose Show Details.

**Important:** The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

5. Optionally, you can save the query, the results, or a selection of the results to a folder, which you can use again See: Saving a Query or its Results to a Folder., page 2-191.

## Managing Your Group Folders

You can copy people from any folder and paste them into Group folders. You can also remove people from your Group folders. You do this using the Data Organizer in the Summary window with the Cut, Copy, and Paste commands.

### **To cut or copy and paste people in folders:**

1. In the Data Organizer, open the folder from which you want to copy or cut people.
2. Select the person or people you want to copy or cut.
3. Choose Copy or Cut from the Edit menu, toolbar, or right mouse menu.
4. If you are adding the person or people to another folder, select the group folder in which you want to paste them.
5. Choose Paste from the Edit menu, toolbar, or right mouse menu.

**Note:** To delete a group folder, see: Deleting a Folder, page 2-192.

## **Entering a New Employee**

Three templates are provided in Oracle HRMS that enable you to enter employees. These are:

- **Enter Employees** - This is intended to be used by users who are only interested in entering new employees onto the system, for example data entry clerks. It only uses the Maintain window and includes all the fields required to set up an employee.
- **Maintain Employees** - This enables users to enter employees onto the system, and also to maintain existing records. It uses the Find, Summary and Maintain window to enable users to control a large amount of information relating to employees and their assignments.
- **Enter and Maintain Employees (HR Foundation)** - This template is included on the HR Foundation menu, but can also be used by people who have a full Oracle HR license. It uses the Find and Maintain windows and includes all the fields required to enter and maintain an employee. It has a very simple user-interface and does not have any date-track functionality enabled.

Your system administrator will have set up these templates according to the needs of your enterprise and will have restricted your access according to the role you have to perform.

### **To enter a new employee using the Enter Employees template:**

1. If the New window is not displayed choose the New icon in the toolbar. Select New Employee.
2. Enter the personal details for the new employee. You must enter:

- name
- type
- gender
- employee number and hire date
- date of birth (for assignment to a payroll)
- BSN/SOFI number (Netherlands users only)
- Social Security Code (Hungarian users only)
- NIF Number (Spanish users only)
- Marital status and nationality (Polish users only)
- Family name (UAE users only)

All other personal information is optional.

**3.** Enter the assignment details for the new employee. You must enter:

- organization (this defaults to the current Business Group)
- professional category and contribution group (Spanish users only)

You can also select other employment information, such as, job or position, grade, supervisor, and payroll details.

**4.** Your localization team may have created further tabs for you to complete. If you are a Belgian user then you must select the preferred correspondence language in the Communication field on the Further Details tab.

If you are a Hungarian user then you must enter the tax identification number on the Employment tab and mother's maiden name on the Further Name tab.

If you are a Spanish user then you must enter the work center to which the employee belongs. You can also specify if the employee has contributed towards social security for over 35 years.

Netherlands users can enter the IZA participant number and specify whether the employee is on contract with another organization on the Further Details tab.

Polish users can enter NIP (personal tax identifier) number and the legal-employer name on the Employment Information tab.

If you are a UAE user, you must enter the following information:

- Nationality on the Additional Information tab

**Important:** The Date of Change and Reason for Change fields are enabled only if you enter a nationality that matches the local nationality for the legal employer and a previous nationality for the employee.

- Legal employer name on the Employment Details tab

In addition, UAE users can also enter personal details such as first name, family, and mother's name in an alternate language on the Additional Name Details tab.

5. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

### **To enter a new employee using the Maintain Employees template:**

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

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

4. Set your effective date to the date when you want the assignment to begin, such as the hire date. You can enter a date in the Date field next to the timeline bar and choose Go.
5. Enter personal information for the employee. You must enter:
  - name
  - type
  - gender
  - employee number and hire date
  - date of birth (for assignment to a payroll)
  - BSN/SOFI number (Dutch users only)
  - Mother's maiden name, tax identification number, and social security code (Hungarian users only)

- NIF number (Spanish users only)
- Marital status, nationality, and legal-employer name (Polish users only)
- Family name and nationality (UAE users only)

All other personal information is optional.

6. Choose the Communication tab if you want to enter contact information, such as addresses and phone numbers.

**Note:** It is mandatory for Belgian users to select the preferred correspondence language in the Communication field on this tab.

7. Enter application information in the Assignment, Compensation, and Schedule tabs, as required.

See: Entering Employment Information, page 2-182

8. Enter information in any other tabs that may have been created for your localization. For example, many localization teams will include an Extra Information tab to enable you to enter country-specific information.

If you are a UAE user, you must enter the employer name on the Employment Details tab.

9. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See Multiple Person Records, page 2-37

## Entering Employment Information

When you enter an employee or hire an applicant, Oracle HRMS automatically creates a default assignment for that employee. You can view and update the default assignment using the Maintain Employee windows.

### To update employee information:

1. In the Summary window, use the Data Organizer to select the employee and choose Show Details.
2. Set your effective date to the date the information should change.

3. Choose the Assignment tab. If the employee has multiple assignments you can select a different assignment from the drop-down list.
4. Select the organization to which you want to assign the employee. By default, the employee has an assignment either to the Business Group, or to the organization to which he or she was an applicant.
5. Select the job or position for which this person has been assigned.
6. Select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.
7. If a location is defined for the Business Group or other organization, it appears as a default. Change this, if required.
8. Check the Manager check box if the assignment is at manager level.
9. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee number, for the employee's first assignment.
10. Select a status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).  
*See: Assignment Statuses, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
11. Select the employment category, for example part-time or full time.
12. Select the name and employee number of the employee's personal supervisor.
13. Choose the Compensation tab to enter a payroll, salary basis, or salary. The salary basis is the duration for which salary is quoted, such as per month or per year.
14. Choose the Schedule tab to enter information about normal working hours or probation period for the assignment.
15. Choose Correction or Update. Remember to choose Correction if you are correcting information that was created by default.
16. Save your work.

## Maintaining Contingent Worker Information

Use the Maintain Contingent Workers template.

### **To update contingent worker information:**

1. Select the relevant contingent worker and choose the Show Details button.
2. Choose the Personal tab to enter or update the contingent worker's name.
3. Choose the Communication tab to enter or update home or work contact details.
4. Choose the Assignment tab to enter or update information about the worker's supplier, assignment, or work structures.

**Note:** If you use Oracle Services Procurement to provide purchase order information, you cannot alter assignment or supplier information obtained from the purchase order or purchase order line. However, you can select a different purchase order or purchase order line.

5. Choose the Schedule tab to update the working hours information.
6. To end the placement, choose the End Placement button.
7. Select Correction or Update.
8. Save your work.

## **Activating an Assignment**

You can activate an assignment using the Maintain Employee windows. For example, you may want to active an employee's assignment after an employee returns from maternity leave. The Active Assignment status means that the employee is working in accordance with his or her usual working conditions.

There are two methods you can use to activate an assignment.

### **To activate an assignment in the Summary window:**

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to activate. Expand the node until the assignment you want to activate is displayed. Select the assignment.
2. Set the effective date to the date upon which you want to activate the assignment.
3. Choose the Actions button.
4. Select Activate Assignment and choose Next.

5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

**To activate an assignment in the Maintain window:**

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to activate. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to activate the assignment.
3. Choose the Assignment tab and select the assignment you want to activate from the drop-down list.
4. Choose the Actions button.
5. Select Activate Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

## Creating Additional Assignments

You can create additional assignments for an employee using the Maintain Employees windows.

**To create an additional assignment:**

1. In the Summary window, use the Data Organizer to select the employee for whom you want to create an additional assignment.

**Note:** If you want to display the details of the employee you can choose the Show Details button to open the Maintain window.

2. Set the effective date to the date upon which you want to begin the assignment.
3. Choose the Actions button.
4. Select New Assignment and choose Next. A new assignment is created for the employee.
5. Choose Finish to save your changes.

If you want to make the new assignment the primary assignment, see: Changing

## Suspending an Assignment

You can suspend an assignment using the Maintain Employee windows. For example, you may want to suspend an employee's assignment while they are on maternity leave.

There are two methods you can use to suspend an assignment.

### **To suspend an assignment in the Summary window:**

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to suspend. Expand the node until the assignment you want to suspend is displayed. Select the assignment.
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Actions button.
4. Select Suspend Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

### **To suspend an assignment in the Maintain window:**

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to suspend. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Assignment tab and select the assignment you want to suspend from the drop-down list.
4. Choose the Actions button.
5. Select Suspend Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

## Terminate a Secondary Employee Assignment

You can terminate a secondary employee assignment using the Maintain Employee windows.

There are two methods you can use to terminate a secondary employee assignment.

### **To terminate a secondary employee assignment in the Summary window:**

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to terminate. Expand the node until the assignment you want to terminate is displayed. Select the assignment.

**Note:** You cannot terminate the primary assignment.

2. Set the effective date to the date upon which you want to terminate the assignment.
3. Choose the Actions button.
4. Select Terminate Secondary Employee Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

### **To terminate a secondary employee assignment in the Maintain window:**

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to terminate. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to terminate the assignment.
3. Choose the Assignment tab and select the assignment you want to terminate from the drop-down list.
4. Choose the Actions button.
5. Select Terminate Secondary Employee Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

## Ending a Secondary Employee Assignment

You can end a secondary employee assignment using the Maintain Employee windows. There are two methods you can use to end a secondary assignment.

### **To end a secondary employee assignment in the Summary window:**

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to end. Expand the node until the assignment you want to end is displayed. Select the assignment.
2. Set the effective date to the date upon which you want to end the assignment.
3. Choose the Actions button.
4. Select End Secondary Employee Assignment and choose Next.
5. Choose Finish to save your changes.

### **To end a secondary employee assignment in the Maintain window:**

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to end. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to end the assignment.
3. Choose the Assignment tab and select the assignment you want to end from the drop-down list.
4. Choose the Actions button.
5. Select End Secondary Employee Assignment and choose Next.
6. Choose Finish to save your changes.

## Checking for Duplicate People

If you enter a person in the Hiring Applicants or the Maintain Employee windows, with the same first and last name as a person who already exists on the system, a caution message will be displayed if you have the HR: Cross Business Groups profile option set to No. If you have specified a date of birth, the caution will only be displayed if another record with the same date of birth, or no date of birth exists. If you want to see more details about the existing records use the Find Duplicate button.

**Note:** The caution message is displayed if there are any people with the same name throughout the system, however, the Find Duplicate button only enables you to access the details of people for whom you have security access.

If you have the HR: Cross Business Groups and HR: Cross BG Duplicate Person Check profile options set to Yes, then a list of values is displayed showing the potential duplicates across business groups. You can either select one of the records shown to link the records together to show they are the same person, or cancel the save and use the Find Duplicates button to see more details if any of the records are in your business group.

For more information about the HR: Cross BG Duplicate Person Check user profile, see: *User Profiles, Oracle HRMS Configuring, Reporting, and System Administration Guide*

### **To check for duplicate people:**

1. Enter the new person or make any required changes in the Maintain window.
2. Choose the Find Duplicate button. The system now runs a query on all the people with the same first and last name, and date of birth if specified in the Maintain window, as the person you were editing, based on your security access, and displays the results in the Find window.
3. If you want to see details of any of the people retrieved in the query, select the record and choose the Details button. You will be prompted to save any changes that are pending.

**Note:** If you select not to save the changes, you will lose any data entered for that person. If you are entering a new person it is recommended that you do not save the changes until you have investigated any possible duplications.

The details of the person selected in the Find window are now displayed in the Maintain window.

**Note:** If the Security check box is not checked on the Find window it is possible that you will see records that you are not permitted to retrieve, and hence will not be able to view in the Maintain window.

## **Sending a Workflow Notification**

You can send an email notification to other people or job roles informing them of

actions you have completed or actions they need to take. You use the Summary window of the Hiring Applicants form. The notification message is made up of details relating to the person and assignment and is usually completed as part of an action such as hiring a person.

**To send a workflow notification:**

1. Use the Find window to search for the person you are sending the notification about, or select them from the Record navigator in the summary window.

2. Choose the Notification button.

If you select the person node and choose the Notification button, only tokens associated with the person will be used in the message such as Last\_Name. If you select the assignment node, then tokens relating to the assignment details will also be used, such as Job.

3. In the Notification window, choose the message you want to send and the person or role you want to send it to. The messages are set up in Oracle Workflow Builder.
4. Choose Preview to view how the message will appear to the recipient.
5. Choose Send to send the notification message.

## Entering Visa Related Data

You can enter a large amount of visa related information, such as passport information, and visit history, using the Maintain Visa windows.

**Note:** If you are using the Oracle Payroll interface to the International Tax Navigator from Windstar Technologies Inc., you must input visa data. You use the Extra Information Type (EIT) VISA Residency Details to set the Non Resident Alien parameter. The EIT determines if a person is a resident or non-resident. Oracle passes the residency information to Vertex for use in the tax calculation.

**To update employee information:**

1. In the Summary window, use the Data Organizer to select the employee and choose Show Details.
2. Enter the I-9 Status and I-9 Expiry information for the employee.
3. Choose the Visa Administration tab to enter information relating to a person's visa into a number of extra information types. You can enter the following information:

- Alien Income Forecast
- Passport Details
- Visa Details
- Visa Payroll Details
- Visa Residency Details
- Visa Visit History

See: Person Extra Information Types, page 2-18

4. Choose the Visa Checklist tab to enter scheduled and completed task information relating to visa holders within your enterprise.
5. Choose the Address button to add further addresses, such as the employee's primary home country address.  
See: Entering Addresses, page 2-157
6. Choose the Contact button to enter details of the person's next of kin and other contacts.  
See: Entering Next of Kin and Other Contacts, page 2-166
7. Choose the Notify button to send notification of the visa's expiry to the employee and supervisor.
8. Save your work.

## **Saving Search Criteria or Search Results to a Folder**

When you enter a query in the people management Find window, you can save the query or its results to a folder. The system adds the folder to the Data Organizer on the Summary window. The next time you use the Summary window, you can open the folder to work with the saved list of people (if you saved the query results) or perform the query again (if you saved the query). For more information about the types of folder, see: Folders For Saved Search Criteria or Results, page 2-176.

Perform your find using the Find window before following these steps.

### **To save a query to a Search Criteria folder:**

1. Choose the Save As button.  
The Save As window is displayed.

2. Make sure Search Criteria is selected.
3. Select a folder in which to create the new folder.
4. Enter a unique name for the folder.
5. Select Public if you want the folder displayed in the Public folders list for other users to see. A folder is also created in your Personal Folders list.
6. Choose Save.

You can see the folder in the Data Organizer when you view the Summary window. Expand Private Folders to see your new folder.

**Note:** If you cannot see your folder on the Summary window, right-click on the Data Organizer and choose Refresh.

### **To save the results of a query to a Group folder:**

1. In the results list, select the people you want to add to your folder.
2. Choose the Save As button.  
The Save As window is displayed.
3. Make sure Only Selected Results is selected.
4. Select a folder in which to create the new folder.
5. Enter a unique name for the folder.
6. Choose Save.

You can copy people from other folders into Group folders in the Data Organizer. See: *Managing Your Group Folders*, page 2-178.

## **Deleting a Folder**

You can delete Search Criteria and Group folders from the Data Organizer on the Summary window if you no longer need to use them. You cannot delete Public folders.

### **To remove a folder from the Data Organizer:**

1. Expand Personal Folders and select the folder. to be deleted.
2. Choose Delete from the Edit menu. You can also right-click and choose Delete from

the right mouse menu.

A folder does not have to be empty before you can delete it.

3. Save your work.

## Creating a New Group Folder

You can create a new group folder or subfolder on the Data Organizer of the Summary window. Then you can add people to your new folder by cutting (or copying) and pasting from other folders. See: *Managing Your Group Folders*, page 2-178.

**Note:** Using the Data Organizer, you can only create new folders in the Personal Folders branch. Use the Find window to create Public folders.

### To create a new folder on the Data Organizer:

1. Select Personal Folders.
2. Select a folder in which to create the new folder.
3. Right-click and choose New Folder.
4. Enter a name for your folder in the New Folder window.
5. Choose OK.
6. Save your work.

# Reporting on the Workforce

## New Hire Reporting

New hire reporting is the process of reporting newly hired and rehired employees to a state agency. As an employer, you are required to report on your new hires within a certain number of days after the date of hire.

A primary purpose of new hire reporting is to ensure that individuals who are legally responsible for making child support payments are in fact making these payments by means of pay garnishments. Some states also use new hire reporting to help in detecting abuse of assistance programs such as Workers Compensation and unemployment insurance.

Payroll departments are normally responsible for submitting the new hire reports for the GREs in their enterprise. In most states, they must submit these reports within a certain number of days, usually 20 days. However some states have different reporting requirements. Oracle HRMS recommend that you verify the due date with the state to which you are filing the report.

Oracle HRMS enables you to report on your newly hired and rehired employees using the New Hire State Report and the New Hire State Magnetic Media report.

## Single and Multistate Employers

Single state employers, that is, an employer who hires and employs people within one state, are required to report all new hire information to the state in which all its employees work. Multistate employers, that is, an employer who hires and employs people in two or more states, can either report all the newly hired employees to each working state or report all newly hired employees to one state.

A multistate employer who reports its newly hired employees with one state must submit their report using the New Hire State Magnetic Media report. This report uses the selected state's format to produce one report for all new hire information for each state within your GRE. Oracle HRMS recommend you contact the individual state agency to which you are reporting, as some states have different reporting electronic data requirements.

**Note:** If you are a multistate employer who wants to report all new hire information to one state, you must register with the DHHS (Department of Health and Human Services). Refer to the DHHS website for more information about registering with them:  
[www.acf.hhs.gov](http://www.acf.hhs.gov)

## Data for New Hire Reports

These reports include the following information that is required for reporting your new hires:

- Employee name, address, date of hire and social security number
- Employer name, address and federal identification number (EIN)

**Note:** State agencies require the GRE's federal identification number (issued by the IRS), or its SUI identification number, or both, to be able to identify it. You can enter this information for your GRE in the Organization window.

Additional information may also be included in the report, depending on the requirements of the state to which you are submitting your report. This information includes:

- Employees date of birth.
- Their jobs, hours normally worked per week, full or part time employment category, salaries, rates and pay frequency.
- The availability to the employees, and their dependents, of employer-provided health care insurance plans.
- Whether employees currently have child support obligations.
- Employer MD UI number

New Hire reports must also include the name, job and telephone number of the employee serving as the GRE's contact for new hire reporting.

## The Workforce Headcount Report Set

The workforce headcount report set includes the Workforce Count Report, the Workforce Count Report (Spread Sheet Version) and the Head Count Detail Report. The reports display headcount information for your organization on a local or world-wide basis for the search parameters you specify.

## The Workforce Count Reports

Both of the workforce count reports enable you to access simple workforce information for all organizations within an organization hierarchy and date range you specify. The difference between the workforce count reports is that the Workforce Count Report (Spread Sheet Version) enables you to open the report in a spreadsheet format. The

reports display a breakdown of the information using the following headers:

- Organization
- Rev/Non-Rev
- Start (Total)
- End (Total)
- Net Change
- Hires
- Terminations
- Other (Net)

**Important:** The dates you specify must fall within one version of the Organization Hierarchy on which you are reporting.

The reports display a count of defined worker types, including all types of contingent and temporary workers. The reports also display transition information, for example the number of new hires and terminations.

The reports return a headcount value for the assignment ID based on either the assignment budget value, or the supplied TEMPLATE\_HEAD FastFormula. You can create custom FastFormulas on which to return the headcount values by creating a FastFormula named BUDGET\_HEAD. For more information, see *Running the Workforce Count Reports*, page 2-204

## The Head Count Detail Report

The Head Count Detail Report enables you to display detailed headcount information for an organization hierarchy. The report displays a breakdown of the information using the following headers:

- Organization
- Division
- Rev/Non-Rev
- Beginning Head Count
- Regular
- Contract

- Temp
- New Hires
- Offers
- Vacant FTE
- Termination
- Ending Headcount
- # Change
- % Change
- Attrition Rates

Three FastFormulas are supplied with the Head Count Detail Report, that are used to control the output of the report. These are:

- HR\_PERSON\_TYPE\_TEMPLATE which maps person types and employment categories to worker types regular, temporary and contract.
- HR\_MOVE\_TYPE\_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for employees.
- HR\_CWK\_MOVE\_TYPE\_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for contingent workers.

If your enterprise has different requirements to those defined in the supplied formulas, then you can create your own FastFormulas to accurately represent the setup of your enterprise. You can define worker type mappings to person type and employment category by creating a FastFormula named HR\_PERSON\_TYPE. Similarly, you can create your own FastFormula to define leaving reasons by creating a FastFormula named HR\_MOVE\_TYPE for your employees and HR\_CWK\_MOVE\_TYPE for your contingent workers. If you define a formula with one of these names, then it overrides the corresponding supplied formula when you run the report. For more information, see: Running the Head Count Detail Report, page 2-203

## Running the Full Personal Details Report Set

To create printed reports of the personal information held for one person, you can run the Full Personal Details report set. It comprises four reports that meet employees' rights to view their own personal details under data protection legislation:

- Full Person Details 1 reports on addresses and information entered in the People window, such as name, date of birth, nationality, and work telephone number.

- Full Person Details 2 reports on applications and applicant interviews.
- Full Person Details 3 reports on assignment information including periods of service, payment methods, and element entries.
- Full Person Details 4 reports on miscellaneous work information, including special information, absences, recruitment activities, and contacts.

If you do not need to see all this information for the employee, you can run individual reports rather than the report set. The Full Person Details report, Full Assignment Details report, and Full Work Details report are equivalent to reports 1, 3, and 4 in the report set, respectively. The Full Applicant Details report is equivalent to report 2 in the report set, but you can only run this as a separate report for an applicant, not an employee.

You run report sets from the Submit Request Set window.

**To run the Full Personal Details report set:**

1. In the Request Set field, select Full Personal Details.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the reports.
4. Enter the name of the person for whom you want to print the reports.
5. Choose the Submit Request button.

## Running the Employee Summary Report

This report is a current summary of information for an employee, covering addresses, contacts, period of service, assignments, special information, personal payment methods, and element entries.

Run reports from the Submit Requests window.

**To run the Employee Summary Report:**

1. In the Name field, select Employee Summary.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Enter the name of the employee whose summary you want to see.

5. Choose the Submit button.

## Running the Employee Payroll Movements Report

The Employee Payroll Movements Report shows employee assignment changes for a particular payroll and pay period. Employee assignment changes include new hires, terminations, transfers in, and transfers out. You can use this information to monitor employee assignment changes for turnover analysis.

You run the Employee Payroll Movements Report from the Submit Requests window.

### To run the Employee Payroll Movements Report:

1. In the Name field, select Employee Payroll Movements Report.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Select the payroll and pay period for which you want to see the information.
4. In the Employee Detail field, select:
  - Summary Only, to see only the totals for each category of change
  - Assignment Number, to see a list of new hires, terminations, transfers in, and transfers out in order of assignment number
  - Employee Name, to see a list of new hires, terminations, transfers in, and transfers out in order of employee name
5. Choose Submit.

## Running the Worker Organization Movements Report

The Worker Organization Movements Report shows worker movements into and out of a particular organization or organization hierarchy. Worker movements include new starters, terminations, transfers in, and transfers out for employees, contingent workers, or both.

Run the Worker Organization Movements Report from the Submit Requests window.

### To run the Worker Organization Movements Report:

1. In the Name field, select Worker Organization Movements Report.
2. If the Parameters window does not open automatically, click in the Parameters field.

3. Specify the organization as follows:
  - To see information for a whole organization hierarchy, select its name and version in the Organization Structure and Version fields. Leave the Parent Organization field blank.
  - To see information for one organization, select its name in the Parent Organization field. Leave the Organization Structure and Version fields blank.
  - To see information for an organization and its subordinates in a particular hierarchy, select the name of the organization in the Parent Organization field, and the name and version of the organization hierarchy to which it belongs in the Organization Structure and Version fields.
4. Specify the period for which you want to see the information.
5. In the Worker Type field, specify whether the report should include employees, contingent workers, or both.
6. In the Worker Detail field, select:
  - Summary Only, to see only the totals for each type of movement
  - Assignment Number, to see a list of worker movements in order of assignment number
  - Worker Name, to see a list of worker movements in order of worker name
7. Choose the Submit button.

## Running the Assignment Status Report

This report lists people assigned to particular organizations, jobs, positions and grades, with specific assignment statuses. If you select both applicants and employees as person types, the report prints out in two sections. Otherwise it prints for the type you select.

Run reports from the Submit Requests window.

### To run the Assignment Status Report:

1. In the Name field, select Assignment Status Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Leave the Organization Structure field blank to see information about all

organizations. Select an organization hierarchy name to see assignment statuses in a number of subordinate organizations.

5. If there are multiple versions, select a version.

If the effective date lies between the version's start and end dates, the report is effective as of this date. If it lies outside these dates, the report is effective as of the start date of the version you select.

6. Leave the Parent Organization field blank to see information about all organizations. Select a name in this field to see information on all subordinate organizations in the hierarchy.

**Note:** You must enter a value in this field if you have entered a value in the Organization Structure field, and you must leave this field blank if you left that field blank.

7. Make entries in the Group, Job, Position, Grade and Payroll fields as required.

If you leave all segments of the Group flexfield blank, you see information about employees in any groups. If you leave one segment blank you see employees with any value for that segment.

8. Enter Yes in the Primary field if you want to report on primary assignments only. Leave blank to include all assignments.
9. Select Employee, Applicant or Both in the Person Type field. This determines which sections of the report are printed.
10. Select up to four assignment statuses, or leave blank to list employees and/or applicants with any assignment status.
11. Choose the Submit button.

## Running the Terminations Report

This report shows the reasons why workers left your organization within a specified period.

There are two Totals columns included in the Terminations report. The Total column represents the aggregate of individual Total columns whereas the All Termination column represents all the employees who have been terminated between the Date From and Date To parameters specified while generating the report.

You run reports from the Submit Requests window.

### **To run the Terminations Report:**

1. In the Name field, select Terminations Report.  
The Parameters window opens.
2. Enter the effective date for which you want to see the report.
3. If you want to see terminations for a complete or partial organization hierarchy, select the hierarchy name and version.
4. In the Parent Organization field, select the parent organization within the selected organization hierarchy whose subordinate organizations you want to include in the report.  
  
If you have not selected an organization hierarchy, enter in the Parent Organization field the name of the single organization for which you want to generate the report. In this case, as you have not selected an organization hierarchy, the report applies to the specified organization only; terminations in subordinate organizations do not appear in the report.
5. Enter the start and end dates of the period in which you are interested.
6. Select at least one termination reason to include in the report.
7. Click Submit.

## **Running the Conclude Placement Report**

The Conclude Placement Report shows, for a specified period and termination reason, the number of terminated contingent-worker placements in an organization.

Run the Conclude Placement Report from the Submit Request window.

### **To run the Conclude Placement Report:**

1. In the Name field, select Conclude Placement Report.  
The Parameters window opens.
2. To include placement-termination data for multiple organizations in an organization hierarchy, select the hierarchy name in the Organization Structure field.
3. In the Parent Organization field, select the organization, within the specified organization hierarchy, whose subordinate organizations you want to include in the report. If you have not selected an organization hierarchy, enter the name of the single organization you want to include in the report in the Parent Organization

field.

4. Enter the start and end dates of the period in which you are interested.
5. Select at least one termination reason.
6. Click Submit.

## Running the Head Count Detail Report

You run the Head Count Detail Report from the Submit Request window.

If the dates you enter in the Date From and Date To fields fall within one version of the organization hierarchy you define, only one page of results is returned. If, for example, the dates span more than one version of the organization hierarchy, one page of results will be returned for each version.

### To run the Head Count Detail Report:

1. In the Name field, select Head Count Detail Report.
2. Enter the Parameters field to open the Parameters window.
3. Set the date from which the report begins the search.
4. Set the date up until which the report searches.
5. Select the organization hierarchy on which you want to report.
6. Enter the top organization.
7. Select the type of worker which you want to report. For example, you can choose to report on employees, contingent workers, or both.
8. Select the roll up. If yes, all organization values will be rolled up to the parent organization.
9. Select the budget type for the report.
10. Select Yes, if you want to include the top organization entered at step 6.  
If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.
11. Select the assignment type to include in the report.
12. Enter the reporting period in the Days Prior to End Date field. The number of days you enter determines how many days the report covers, prior to the end date of the

organization hierarchy version you specify in step 4.

13. Choose the OK button.
14. Choose the Submit button to run the report.

The report displays the results for the criteria you entered.

## Running the Workforce Count Reports

You run the Workforce Count Report and the Workforce Count Report (Spread Sheet Version) from the Submit Request window.

### To run the workforce count reports:

1. In the Name field, select either the Workforce Count Report or the Workforce Count Report (Spread Sheet Version). Choose the spreadsheet version if you want to open the report in a spreadsheet format.
2. Enter the Parameters field to open the Parameters window.
3. Set the date from which the report begins to search.
4. Set the date until which the report searches.

**Note:** The Start Date and End Date you specify must fall within one version of the organization hierarchy on which you want to report.

5. Select the organization hierarchy on which you want to report.
6. Enter the top organization.
7. Select the roll up. If yes, all organization values will be rolled up to the parent organization.
8. Select the budget type for the report.
9. Select yes, if you want to include the top organization entered at step 6.

If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.

10. Select the assignment type to include in the report.
11. Choose the OK button.

12. Choose the Submit button to run the report.

The reports display headcount information for the parent organization and all the organizations below it in the organization hierarchy. You can choose to run the Workforce Count Report for an entire hierarchy, or from a selected parent organization within the hierarchy.

## Running the Duplicate Person Report

If you are upgrading from a release prior to the PER G Minipack, then, as part of your upgrade to support the global person functionality, an entry for every person record in HRMS is made in the TCA.

See: The Person Record, page 2-7 for more information on how the HRMS and TCA schemas link together.

If your enterprise has multiple business groups and you have international employees, then you may find that, after this upgrade, you have multiple TCA party records for the same person. For example, this may occur if a person has transferred from one business group to another.

To identify potential duplicate records, you run the Duplicate Person report in the Submit Requests window.

### To run the Duplicate Person report:

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

## Running the Full Person Details Report

The Full Person Details Report provides you with accurate information about an employee's history. The report features all periods of service and changes in employment history. Employee's can request the report on an ad-hoc basis.

Run reports from the Submit Request window.

**To run the Full Person Details Report:**

1. In the Name field, select Full Person Details Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter an effective date.
4. Select the employee to be reported on.
5. Choose the Submit button.

## Running the Person Full History Report

Use this report to see the personal and professional details of employees and contingent workers in your enterprise. You can include an employee's applicant history and details about the current assignment such as absence, contact, and salary information in the report. You can also see the details of multiple assignments, if any, for the employee or contingent worker.

This report highlights any information that has changed over a period of time. If your enterprise uses element sets to group together similar elements, then you can select to include only those elements from a particular set.

For contingent workers, you can see supplier details such as supplier site, purchase order number, and purchase order line, details about the periods of placement and assignment rates. You cannot view the absence and termination details for contingent workers.

Run the Person Full History Report from the Submit Request window.

**To run the Person Full History Report:**

1. In the Name field, select the Person Full History Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the person for whom you want to see the details.
4. Select Yes to include the details held in descriptive and key flexfields attached to a person, such as job, position, and assignment. If the flexfield structure is not defined or contains no values, you do not see these details in the report.
5. Select the element set to restrict the information to a specific group of elements. If you do not select any element set, all elements present in the employee's element entries are listed. For example, if the compensation element set includes details about salary, bonus, and stock options, you can view these details for the employee

6. Select Yes in the appropriate fields to include the following details:
  - Employee's applicant record for the current assignment
  - Employee's assignments, absences, and terminations, and contingent worker's assignments
  - Employee's salary and contingent worker's assignment rates
  - Contacts, addresses and phone numbers for employees and contingent workers
  - Employee's ethnic origin, nationality, and disability status

Otherwise select No. If you enter No, or if there are no records for that parameter, you do not see the individual records in the report.

7. Choose the Submit button.

## Using the People Folders

Using the People Folder window, you can enter inquiries about the people held on Oracle HRMS. You select the fields of personal information you want to see, and position them in the order you prefer. For example, you can produce an alphabetical listing of all applicants and their gender, nationality, and disability registration.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

**Note:** The system administrator can create configured versions of the People Folder window so that you use each version for one person type only.

### To produce lists of assignments:

1. Enter and run a query in the folder. For example, you could run the query "C%" in the Full Name field to view all people whose names begin with C.
2. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Listing Assignments Using the Assignments Folder

Using the Assignments Folder window, you can query lists of current assignments, past assignments, or both. You select the fields of assignment information you want to see, and position them in the order you prefer. For example, you can produce a listing of all current employees ordered by organization, and by grade within organization.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

**Note:** The system administrator can create customized versions of the Assignments Folder window so that you use each version for one person type only.

The system administrator can also link this window in a task flow so that you use it to access other windows of employment information. Notice that if you select a past assignment in the folder, you cannot open other windows of employment information.

### To produce lists of assignments using the assignment folder:

1. Select whether you want to view current assignments, past assignments or both.
2. Run the query.

The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

3. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
4. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Listing Assignments Using the List Assignments Window

In this window, you can view *current* employees and applicants. To view former employees or applicants (or both current and former), see: Using the List People By Assignments Window, page 2-209

### **To produce lists of assignments:**

1. Select values in one or more fields in the top part of the window, and choose the Find button.

If you enter the Job, Position, Grade, or Group fields, a window opens prompting you for individual segments of the flexfield. You can enter selection criteria in one or more segments. This means that you can search on *parts* of the job name, for example.

The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## **Using the List People by Assignment Window**

In this window you can choose whether to view current or former employees, applicants, or contingent workers. However, you must search on a whole Job, Position, or Grade name, not on segments of these flexfields. To search on segments of the flexfields, use the List Assignments window, see: Listing Assignments Using the List Assignments Window, page 2-208

### **To produce lists of assignments:**

1. Select values in one or more fields in the top part of the window, and choose the Find button.

The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Listing Workforce by Position

There are two windows for viewing lists of workers by position:

- List Workforce by Position
- List Workforce by Position Hierarchy

### List Workforce by Position Window

To view workers in a single position, or in all positions corresponding to a job or organization, use the List Workforce by Position window.

#### To view worker names by position:

1. Select any combination of an organization, job, or position.
2. Choose the Find button.

The folder displays the positions that match your selection criteria, together with the holder's name employee, or contingent worker number and worker type. The worker type is similar to the person type, except that the worker type only displays the person's active worker type. For example, the person type of *Employee.ex-applicant* displays as *Employee*.

If there is more than one holder for a position, the number of holders is displayed in the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

**Note:** You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

### List Workforce by Position Hierarchy Window

To view lists of workers in a number of positions within a hierarchy, use the List Workforce by Position Hierarchy window.

#### To view lists of positions within a position hierarchy:

1. Select a position hierarchy and the highest position in the hierarchy for which you want to list workers.
2. Choose the Find button.

The folder displays all positions below the one you selected in the hierarchy. It also lists the employees and contingent workers who hold these positions as well as

their worker type. The worker type is similar to the person type, except the worker type only displays the person's active worker type. For example, the person type of *Employee.ex-applicant* displays as *Employee*.

If there is more than one holder for a position, the number of holders appears in the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

**Note:** You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about Folders see: Customizing the Presentation of Data , *Oracle Applications User's Guide*

## Listing Workforce by Organization

In the List Workforce by Organization window, you can view lists of employees within one organization or within all organizations below a specified level in a hierarchy you select.

### To list workers in several organizations:

1. Select an organization hierarchy and select the highest organization in this hierarchy for which you want to list workers. Choose the Find button.

### To list workers in one organization only:

1. Leave the Organization Hierarchy field blank and select an organization. Choose the Find button.

You can enter a query in the Workforce block to further restrict the list of employees to be displayed.

### Manager Field

The Manager field identifies any worker for whom the Manager check box is checked in the Miscellaneous region of the Assignment window.

If there is more than one manager in the organization you select, the Manager field displays the number of managers. You can view the names of these managers by choosing the List icon from the Toolbar.

### Type Field

The Type field displays the person type related to the worker identified in the Name field.

### Organization Field

If a worker belongs to more than one organization within the hierarchy you selected, the number of organizations appears in the Organization field. You can view the names of these organizations by choosing the List icon from the Toolbar.

## Listing People by Special Information

To view a list of people who match a particular profile for one Special Information Type, use the List People By Special Information window.

**Note:** The system administrator can create configured versions of the List People By Special Information window so that you use each version for one information type only. For example, one version could be called List People By Technical Skills.

### To list people by special information:

1. Select a Special Information Type.
2. Click in the Details field. A window opens prompting you for the details you have defined for this information type.
3. Enter values in the fields against which you want to match people, then choose OK. If you leave a field blank, it is not used in the matching process.
4. Choose the Find button.

Employees and applicants who match your selection criteria are listed in the folder in the lower part of the window. You can enter a query here to further restrict the list of people. If you have access to the Folder menu you can remove, rearrange, or resize the fields displayed.

For more information about using folders see: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

## Viewing a Worker's Assignment History

Use the Assignment History window to view information about a worker's assignments in both current and previous periods of service and placements. If a worker has been both an employee and a contingent worker, both types of assignment appear in the assignment history.

### To view a worker's assignment history:

1. In the Find Person window, select or enter the worker's full name or number. If you select the worker's name or number from a list, you can limit the list size by

selecting a value in the Current field:

- Yes includes only current workers.
- No includes only ex-workers.
- All includes both current and ex-workers.

2. Choose the Find button.

In the Assignment History window:

- This Period shows complete years and months in the current period of service or placement.
- All Periods shows complete years and months in all periods of service and placements.
- Including Breaks shows total elapsed years and months since the worker's initial hire or placement start date.

By default, Assignment History displays one row of information about each assignment in the current period of service or placement.

3. To display assignments from previous periods of service or placements, click in the Work History Start Date or End Date field and press the Down Arrow key. As the dates for previous periods of service or placements appear, related assignments appear in the Assignment History box. Use the Up Arrow key to reverse the display.

## Running the Terminations with Active Support Order Report

You run this report to produce a list of terminated employees who at the time of termination had an active support order associated to their assignment within the specified period. An assignment is considered to have an active support order if the Child Support element type is associated with it. This report only reports on terminated employees from the state of West Virginia.

You run the Terminations with Active Support Order Report in the Submit Request window.

### **To run the terminations with active support order report:**

1. Select Terminations with Active Support Order Report in the Request Name field.
2. Select the government reporting entity. The report displays only employees within the GRE you select.

3. Select the dates from which you want to report on the terminated employees.
4. Select the order in which you want the report to display the information.

## Setting up New Hire Reporting

You must set up the following information for the New Hire State Report and the New Hire State Magnetic Media report.

### To set up for New Hire reporting:

1. Ensure that a federal identification number (EIN) and a SUI identification number, if appropriate, is on record for each GRE that submits new hire reports.

See GREs: Entering the IRS Identification Number, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Enter new hire reporting information for a GRE.

See: Entering New Hire Report Information for a GRE, *Oracle HRMS Enterprise and Workforce Management Guide*

3. When hiring or rehiring employees, indicate whether they

- are to be included in or excluded from new hire reporting
- have a legal obligation to pay child support.

See: Entering New Hire Report Information for Employees, page 2-38

4. Ensure that the employees you want to include in the report have the following:

- A primary assignment.
- A location for the assignment.
- A GRE for the assignment.

5. Run the new hire reports:

See: Running the New Hire State Report, page 2-214

See: Running the New Hire State Magnetic Media Report, page 2-215

## Running the New Hire State Report

You run the New Hire State Report to produce information on all your newly hired and rehired employees. You can print and submit the new hire information to the state in

which your employees work.

Run the New Hire State Report from the Submit Request window.

**To run the New Hire State Report:**

1. Select New Hire State Report in the Name field. If the Parameters window does not open automatically, click in the Parameters field.
2. Select the date you want the report to run on in the As of Date field. This date defaults to the effective date, however you can change it.
3. Select the GRE and state for which to produce the report.
4. For Iowa and Texas, enter Yes in the Dependent Health Insurance field if the employer offers health care insurance coverage to employees' dependents. Enter No if coverage is not available to dependents.
5. For Iowa and Texas, if health care insurance is available to dependents, enter in the Waiting Period field the number of days after the employee's hire date that dependents must wait before obtaining coverage. This field defaults to zero.
6. Choose the Submit button.

## Running the New Hire State Magnetic Media Report

You can submit your new hire reports electronically to one of the following states: CA, FL, IL, NY, or TX, using the New Hire State Magnetic Media report. The report produces employer, new hire employee and total number information that you can submit to the reporting state.

If you are a multistate employer from one of the above states, you can choose one state to which to submit your new hire reports.

You run the New Hire State Magnetic Media report from the Submit Request window.

**To run the New Hire State Magnetic Media report:**

1. Select New Hire State Magnetic Media in the Name field. If the Parameters window does not open automatically, click in the Parameters field.
2. Select the date on which you want the report to run in the As of Date field. This date defaults to the effective date, however you can change it.
3. Select the GRE and state for which you want to produce the report.
4. Select whether you want to produce an audit report.

The audit report produces two files, the .a01 and the .a03, that you can view with a

spreadsheet application. The .a01 file includes information on the employer and the total number of new hires for each state. The .a03 file includes basic employee information, such as, name and address. You can use these reports to view the information that is contained in the file to be submitted to the state agency.

The audit files that you produce are prefixed with the name of the magnetic file. For example, if the selected state is Texas, the audit report would produce the following two files: TXW4.a01 and TXW4.a03.

5. If you choose Florida as the reporting state and you are a multistate employer, you must select Yes in the Multistate Employer (FL) field.
6. Choose the Submit button.

The file that is created is in the \$APPLCSF/out directory, and has the character set EBCDIC. You can submit this file to the state agency using a diskette format. The file names for each state are:

- CA-4NEWHIRE
- FL- FLW4
- IL-H (first 7 digits of the Federal Identification Number FEIN)
- NY- NEWHIRE.RPT
- TX- TXW4

## Tenure Notifications

The following notification reports are available for you to send to faculty members and their academic manager during the Tenure process.

**Note:** Notifications will eventually be generated through the Workflow process.

### Notification for Non-Tenured Status

You send this notification to faculty members who are serving in a non-tenure position. The notification specifies that the time served in that position does not count toward any future tenure track process.

### Notification for Tenured Status

You send the Notification for Tenure status to a faculty member and their academic manager who by reason of their eminence in the academic discipline, have tenure conferred at the outset of employment.

### **Notification for Tenure-track Status**

This notification is sent to those faculty members who have the potential to become tenured at some later point in time, given the completion of certain requirements.

### **Notification of Tenure Review**

During a faculty members' tenure track, a complete review schedule must be available and calculable. The review schedule is set when the tenure track appointment is made. You send this annual report, which includes review information if due during the academic year, to each faculty member and their academic manager. You should send this notification prior to the review due date as a reminder.

#### **To run the Tenure Notification Reports:**

1. You run reports from the Submit Requests window.
2. Select the notification report name in the Name field.
3. Select the Faculty Member name.
4. Enter the Period Start Date and Period End Date.

**Note:** This step applies only to the Notification of Tenure Review

5. Choose the OK button.
6. Complete the batch process request and choose Submit.

## **Tenure Reports**

The following reports are available to assist you with the administration of Tenure tracking.

### **Tenure: Annual Status Report**

You send this report to tenure track faculty members at the beginning of the academic year. You should generate and send it after all assignments and appointments for the fall academic period have been completed in order to provide the most up to date information.

### **Tenure: Upcoming Events Report**

This report is designed to assist you with the recording and tracking of critical events related to the tenure process.

### **To run the Annual Status and Upcoming Events Reports:**

1. You run reports from the Submit Requests window.
2. Select the Tenure report name in the Name field.
3. Select the Faculty Member name.
4. Choose the OK button.
5. . Complete the batch process request and choose Submit.

### **Tenure: Existing Profile Report**

You send this report to each academic manager at the beginning of the academic year. Originate and send this report after all assignments/appointments have been made for the academic period. Sorted by manager level, Tenured, Tenure-track, last name and academic discipline.

Change to title: Tenure: Impact Report

This high level planning report is designed to help you assess how the overall Tenure profile might affect the college/university. Run this report in the fall academic period to assess Tenure for the upcoming academic year.

Change to title: Tenure: Recap Report

Use this report to look at the results of the Tenure track process. You can also use it for reporting to the governing board. Prepare this report near the end of the academic year when all Tenure considerations have been resolved.

### **To run the Tenure Existing Profile, Impact and Recap Reports:**

1. You run reports from the Submit Requests window.
2. Select the Tenure report name in the Name field.
3. Select the Supervisor Name.
4. Select Direct or Hierarchical
  - Select Direct if the report is for only those faculty members that report directly to the Supervisor.
  - Select Hierarchical if the report is for all faculty members in any level below the Supervisor.
5. Enter the Start Date and End Date.

**Note:** This step only applies to the Impact and Recap reports.

6. Choose the OK button.
7. Complete the batch process request and choose Submit.

# Workforce Intelligence Key Concepts for People Management

## Key Concepts for People Management Intelligence

The following concepts enable you to accurately interpret the results of the People Management intelligence reports:

- Workforce Count, page 2-220
- Workforce Gains and Losses, page 2-220
- Enterprise Selection, page 2-221
- Job Categories , page 2-222

### Workforce Count

One of the most powerful features of the People Management reports is that you can define how workforce is counted.

Workforce does not necessarily have to be a count of the number of people in your enterprise; it can instead be a count of the assignments and any budget measurement type you have set up. For example, you can count workforce using the budget measurement types of FTE or Headcount.

Additionally, by writing your own formula, using Oracle FastFormula, or the provided formula, you can instruct the report to count workforce exactly how you want to.

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

### Workforce Gains and Losses

To enable you to investigate the workforce in your enterprise, the reports calculate gains and losses as follows:

- **Gains** are the total workforce that exists in the organization or organizations at the end of a time period, which did not exist at the beginning of the time period.
- **Losses** are the total workforce that exists in an organization or organizations at the beginning of a period, but no longer exists at the end of the period.
- **Total Workforce** is the workforce at the end of the time period.

**Note:** Workforce is counted using active and suspended assignments.

## Enterprise Selection

You can decide which area of your enterprise to report on using the parameters of the reports. There are two different methods of enterprise selection:

- Rollup Organizations
- Rollup Each Organization

### Rollup Organizations

Use the Organization or Top Organization and Hierarchy parameters, together with the Organization Rollup parameter to report on one organization, an organization hierarchy, or a section of an organization hierarchy.

To report on a hierarchy, or a section of a hierarchy, enter the top organization or hierarchy you want to report on in the report parameters. You can then decide whether or not you want to rollup all the subordinate organizations in the hierarchy by entering either Yes or No in the Rollup Organizations parameter.

In some reports you can leave the Organization parameter blank to include all organizations in the hierarchy.

### Rollup Each Organization

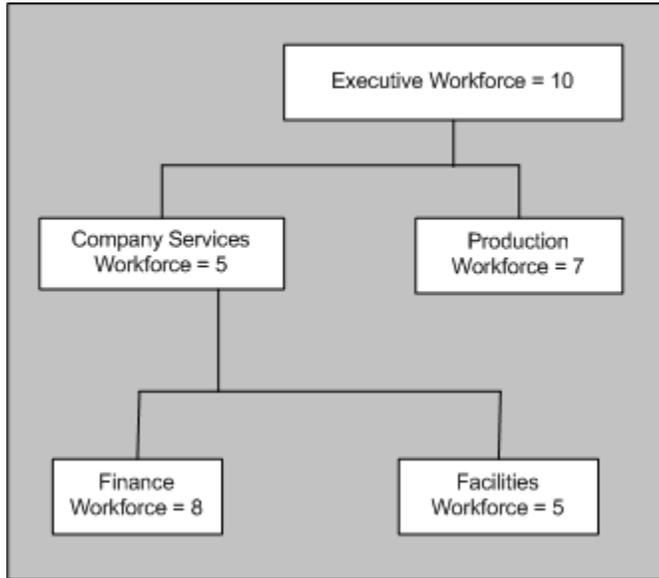
Select the area of your enterprise in the reports by selecting a section of an organization hierarchy. For each report, you only need to enter one organization; all its subordinate organizations are included in the report.

You can then decide to either display information about each organization separately, or rollup information at each level of the hierarchy.

For example, consider the hierarchy for Global Industries shown in the diagram below. To select this section of the hierarchy, you enter Executive in the Organization parameter. The report automatically includes the Company Service, Production, Finance, and Facilities subsidiary organizations.

If you decide not to rollup the workforce count, the report displays each organization independently, and shows the workforce total for only that organization. The workforce total for each organization would be the same as shown in the diagram below. It shows the Executive Workforce of 10 at the top of the organization. Reporting to the Executive Workforce are the Production Workforce of 7, and the Company Services Workforce of 5. Reporting to the Company Services Workforce are the Financial Workforce of 8, and the Facilities Workforce of 5

### Global Industries Hierarchy



If you decide to rollup each organization, the report will display information that is calculated for that organization and all the organizations below it in the hierarchy.

For Global Industries, the Workforce figures would be shown as in the following table:

Organization	Rolled Up Workforce
Executive (Top Organization)	35
Company Services	18
Finance	8
Facilities	5
Production	7

## Job Categories

The Workforce Summary Analysis, Workforce Ratio, and Workforce Comparison HRMSi reports use job categories to investigate Workforce within your enterprise.

**Note:** You can also analyze how successfully you are recruiting for each

job category using the Recruiting and Hiring HRMSi reports.

Oracle HRMS enables you to set up job categories for the different jobs within your enterprise. You can set up categories to classify all your jobs. So you could, for example, set up the job categories of technical, managerial, administration, and so on.

Jobs within your enterprise can fall into more than one category, and HRMS enables you to enter as many categories as you need for a job.

Use the Workforce Ratio report to analyze the percentage of workforce your enterprise has in different job categories. Use the Workforce Comparison report to analyze the absolute levels of workforce.

Both the Workforce Ratio, and the Workforce Comparison reports use assignments to calculate the workforce for each job category. For an assignment to be included it must:

- Be active or suspended.
- Have the job and job category selected.
- Fit the selection criteria entered.

For example: if you report on salaries by grade, the assignment must be for that grade.

If a job category does not have any workforce associated with it, the reports show it as a zero on the table, but do not display it in the bar chart.

Jobs may be assigned to more than one category. For example the job of Software Manager could have the job categories of technical and managerial. If you choose to report on both these categories, reports will display all assignments with the job of Software Manager in both the managerial and technical job categories.

For information on associating jobs with specific job categories, see *Defining A Job, Oracle HRMS Enterprise and Workforce Management Guide*

# Workforce Intelligence for People Management

## Employee Anniversary and Birthday Detail Workbook

This workbook enables you to report on employee anniversaries and birthdays by organization and supervisor hierarchy.

### Worksheets

This workbook has the following worksheets

- Organization Hierarchy
- Supervisor Hierarchy

### Headings and Calculations

The worksheets use the following calculations:

- **Current Service Decimal**  
Calculates the employee's length of service in their latest assignment as a number of years.
- **Total Service Decimal**  
Calculates the employee's length of service since their first assignment as a number of years.

### Organization Hierarchy Worksheet

The Organization Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by organization. Total and current service calculations are in respect of the system date. The workbook uses the current version of the organization hierarchy.

### Business Questions

*When is the anniversary date of employment of my employees in a given organization hierarchy?*

*When are my employees' birthdays?*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

## Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by supervisor. Total and current service calculations are in respect of the system date. The workbook uses the current version of the supervisor hierarchy.

## Business Questions

*When is the anniversary date of employment of my employees in a given supervisor hierarchy?*

*When are my employees' birthdays?*

## Parameters

You must specify values for the following parameters:

- Supervisor

## Employee by Supervisor Status Workbook

This workbook enables you to report on the supervisor hierarchy and salary details for your employees.

## Key Concepts

See the following topics to accurately interpret this workbook:

Workforce Count, page 2-220

## Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

## Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees, by organization.

The worksheet includes employees who have an assignment on the effective date within the selected organization hierarchy.

### Business Questions

*Who supervises my employees in a given organization?*

*How many direct reports do my employees in a given organization have and what are the total salaries of those direct reports?*

### Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

## Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees by supervisor.

The worksheet includes employees who have an assignment on the effective date, and report directly to the selected supervisor.

### Business Questions

*Who supervises my employees?*

*How many direct reports do my employees have and what are the total salaries of those direct reports?*

### Parameters

You must specify values for the following parameters:

- Supervisor
- Effective Date

# Employee Composition Analysis Workbook

The Workforce Composition Analysis workbook investigates employee composition by assignment details, salary band, and time service band.

It enables you to:

- Compare employee assignment details across organizations.
- Analyze salary information across organizations.
- Change salary groupings.
- Report on salary and time in service bands.

## Workbooks

This workbook has the following worksheets:

- By Assignment Details
- By Salary Band
- By Time In Service Band

## By Assignment Details Worksheet

This worksheet enables you to analyze employee assignment details by organization, job, position, or grade.

### Business Questions

*What is the composition of my workforce by assignment?*

### Parameters

This worksheet has no parameters.

## By Salary Band Worksheet

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

### Business Questions

*What is the composition of my employees by salary band?*

## Parameters

This worksheet has no parameters.

## By Time In Service Band Worksheet

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

## Business Questions

*What is the composition of my employees by service band?*

## Parameters

This worksheet has no parameters.

## Headings and Calculations

This worksheet uses the following calculations:

- **Service Band**  
Populates the Service Band page item in the worksheet. This calculation creates the service bands.

## Employee Hired or Terminated Detail Workbook

This workbook enables you to report on employees who terminated or were hired within two specified dates.

Basic employee primary assignment details are shown, including:

- Hire date
- Termination date
- Termination reason where applicable

## Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

## Organization Hierarchy Worksheet

This worksheet enables you to report on employees who terminated or were hired within two specified dates for a given organization and its subordinate organizations.

### Business Questions

*Provide me with a list of employees who have been hired into or who have separated from a given organization hierarchy.*

### Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

### Related Topics

Workforce Count, page 2-220

## Employee Mailing Address (United States Specific) Detail Workbook

This workbook enables you to report on employee current primary addresses in a United States legislation specific address format.

### Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

## Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given organization and its subordinate organizations.

## Business Questions

*Show me the primary addresses for all employees within a specific organization hierarchy.*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

## Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given supervisor and their subordinates.

## Business Questions

*Show me the primary address of each employee reporting directly or indirectly to a specific supervisor.*

## Parameters

You must specify values for the following parameters:

- Supervisor

## Employee Organization Transfer Detail Workbook

This workbook enables you to report on employee primary assignment organization transfers during a given period. The workbook output includes the employee primary assignment details before and after the transfer, including:

- Job Name
- Organization Name
- Supervisor Name

The workbook also shows the movement type (Organization Movement within Hierarchy, Organization Movement out of Hierarchy, Organization Movement into Hierarchy) for each employee transfer.

## Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

### Organization Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given organization and its subordinate organizations.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

#### Business Questions

*Who has transferred into or out of my organization hierarchy?*

#### Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

### Supervisor Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given supervisor and their subordinates.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

#### Business Questions

*Who has transferred into or out of my supervisor hierarchy?*

#### Parameters

You must specify values for the following parameters:

- Supervisor

- Start Date
- End Date

## Employee Primary Assignment Detail Workbook

This workbook enables you to report on basic employee details by employee primary assignment.

The workbook output is grouped by location. Employee primary assignment count totals are shown for each location

### Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

### Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

### Business Questions

*Show me the primary assignment details for each employee within a specific organization hierarchy.*

### Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Location

### Supervisor Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details

by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

The Supervisor Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for a given supervisor and their subordinates.

### **Business Questions**

*Show me the primary assignment details for each employee reporting directly or indirectly to a specific supervisor.*

### **Parameters**

You must specify values for the following parameters:

- Supervisor
- Effective Date
- Location

## **Employee Termination Detail Workbook**

This workbook enables you to report on employees that have separated within a specified time period.

The workbook displays details of all terminated employees, including their basic primary assignment details at the time of termination, including:

- Employee Name
- Employee Number
- Organization
- Job
- Grade
- Position
- Location
- Supervisor
- Working Hours
- Termination date

- Termination reason

## Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

## Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

## Business Questions

*Who has separated from my organization hierarchy and why?*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date
- Budget Measurement Type

## Related Topics

Workforce Count, page 2-220

## Employee Termination with Comments Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook only displays terminated employees who have a salary. The workbook shows the primary assignment details at the time of employee termination, including:

- Employee Name

- Employee Number
- Organization
- Job
- Grade
- Position
- Location
- Supervisor
- Working Hours
- Salary
- Termination date
- Termination comments
- Termination reason

## Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

## Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

## Business Questions

*Who has separated from my organization hierarchy and why?*

## Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

- Start Date
- End Date
- Budget Measurement Type

## Related Topics

Workforce Count, page 2-220

## Human Resource Setup Analysis Workbook

This workbook investigates specific information about your Human Resources system. The workbook enables you to:

- Analyze trends in terminations by ethnic origin
- View basic employee information
- Analyze temporary employee information
- View employee assignment information
- Report on organization hierarchy

## Worksheets

This workbook has the following worksheets:

- Terminations with EEO
- Anniversary Birthdays
- HR Temp List with Tenure
- Employee Home Address
- Employee Job History
- Assignments by Organization
- Assignments by Organization Rollout

## Terminations with EEO Worksheet

This worksheet enables you to analyze terminations with ethnic origin over a specific

time period.

### **Business Questions**

*Why are employees separating?*

### **Parameters**

You must specify values for the following parameters:

- Termination Budget Measurement Type
- Termination Date Lower
- Termination Date Upper

## **Anniversary Birthdays Worksheet**

This worksheet enables you to view birthdays and start dates of current employees. The worksheet also enables you to view other employee information, for example, length of service, employee number, and supervisor name.

### **Business Questions**

*When are the birthdays and anniversaries of my employees?*

### **Parameters**

This worksheet has no parameters.

## **HR Temp List with Tenure Worksheet**

This worksheet enables you to analyze deployment factors associated with positions, people in specific positions, and position applicants.

### **Business Questions**

*How are my employees deployed throughout my organization?*

### **Parameters**

This worksheet has no parameters.

## **Employee Home Address Worksheet**

This worksheet enables you to view the primary addresses of employees.

## Business Questions

*What are my employees' addresses?*

## Parameters

You must specify values for the following parameters:

- Person Name LIKE

To restrict the size of the list returned, you can enter part of the employee's name, preceded and followed by the % wildcard.

## Employee Job History Worksheet

This worksheet enables you to view employee job history across your organization.

## Business Questions

*When were my employees assigned to a particular job?*

## Parameters

You must specify values for the following parameters:

- Job Name

## Assignments by Organization Worksheet

This worksheet enables you to report on the assignments within your organizations.

## Business Questions

*How many assignments are present in each organization?*

## Parameters

This worksheet has no parameters.

## Assignments by Organization Rollup Worksheet

This worksheet enables you emulate the rollup flexibility of HRMSi reports by using an organization hierarchy to control the information displayed.

## Business Questions

*How many assignments are present in each organization?*

## Parameters

This worksheet has no parameters.

## Person/Assignment History Detail Workbook

This workbook enables you to track applicants, monitor workers' assignment history, and analyze termination history.

For a person's assignment history, you can analyze the following:

- Workforce movement within the organization
- Time between recruitment stages
- Trends via termination reasons

## Worksheets

This workbook has the following worksheets:

- Person Assignment
- Application
- Employee Separation

## Person Assignment Worksheet

This worksheet enables you to analyze a person's assignment history between specific dates. For each person you can examine:

- The current assignment
- Details of previous assignments

## Business Questions

*What has an employee been assigned to?*

## Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

## Application Worksheet

This worksheet enables you to analyze an applicant's assignment record between the start and end of an application.

For each employee you can examine the following:

- Total number of applications
- Number of successful applications
- Length of time between different application stages

## Business Questions

*Has a person previously made an application?*

## Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

## Employee Separation Worksheet

This worksheet enables you track termination reasons by type, date, and length of service, allowing you to spot trends among leavers. For each termination, you can:

- Compare termination reasons to discover trends.
- Compare the length of time in an organization against time in a job.

## Business Questions

*Why are employees leaving the enterprise?*

## Parameters

This worksheet has no parameters.

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# Talent Management

## Talent Management Overview

Talent Management is essentially the management of worker competencies to meet enterprise objectives. Oracle HRMS, Oracle SSHR, and Oracle Learning Management (OLM) each supply key components of the Talent Management functionality. For many talent-management tasks, you can use either the Oracle HRMS forms-based interface or the SSHR interface.

## Oracle HRMS and Talent Management

The Oracle HRMS Talent Management functionality encompasses competency management, objective setting and management (known in HRMS as *Workforce Performance Management*), appraisals, career paths, education and qualifications, events, and reviews.

## Competency Management

Competencies are measurable skills a workforce either has or must develop to meet enterprise objectives. The Oracle HRMS competency management functions enable you to:

- Define a library of competencies or upload competency definitions from third-parties. You can use such definitions throughout the enterprise to ensure consistency of approach.
- Identify each worker's competencies in a competency profile.
- Measure competencies using either general rating scales or proficiency scales that are specific to the competency.
- Define the competency requirements of a business group, organization, job, or position.

- Define core competencies for a business group or organization. All workers in the business group or organization must have its core competencies.
- Link competencies to qualifications.

## Workforce Performance Management

The Workforce Performance Management functions encompass the setting, tracking, and assessment of objectives throughout a performance-management period, such as a calendar year. The entity that defines this period and its conduct is the *Performance Management Plan* (PMP). For example, when you publish a PMP, the application generates a *personal scorecard* of objectives for each plan member.

The Workforce Performance Management functions enable you to:

- Create a library of reusable objectives.
- Allocate objectives to workers automatically.
- Cascade objectives through the enterprise hierarchy.
- Record and track objective progress.
- Create appraisals automatically for all members of a PMP.
- Assess objectives during appraisals.

## Appraisals

The appraisal, during which you can evaluate a worker's current competencies, set or assess objectives, identify training to address deficiencies, and assess a worker's advancement potential, is a key talent-management activity: it provides an up-to-date inventory of worker competencies, and it allows you to specify improvement targets and methods to meet enterprise goals.

Using Oracle HRMS functions, you create the components of the appraisal process, in particular the assessment template, the competency assessment template, and the objective assessment template, and perform related setup tasks. To perform the appraisal itself, you use Oracle SSHR.

## Career Paths

You can define career paths based on either job progression or position progression. You define job-based career paths using the Oracle HRMS Map Career Path function. For position-based career paths, you use new or existing position hierarchies.

## **Education and Qualifications**

The Education and Qualifications functions enable you to:

- Identify the educational and professional qualifications your enterprise recognizes.
- Identify the educational establishments that deliver recognized qualifications.
- Record qualifications obtained by each worker.

## **Events and Reviews**

You can set up an event, such as a training course or departmental meeting, and identify employees who are to attend the event. You use this functionality for scheduling training courses only if you are not using Oracle Learning Management.

You can record information about any employee review meeting, such as a performance review, disciplinary hearing, or medical test, using the Employee Review function.

## **Work Preferences**

You can enter work preferences (such as preferred work locations and work hours) for an individual in the Oracle HRMS Work Preferences window.

## **Oracle SSHR and Talent Management**

Managers, HR professionals, and employees can access talent-management functions using SSHR.

### **Appraisals**

Managers and workers use the self-service Appraisals function to define and conduct the appraisal process. Managers use this function to initiate and manage appraisals of their subordinates. Workers use this function to initiate appraisals of themselves. Both workers and managers use this function to participate in appraisals as appraisers, reviewers, or other participants.

### **Workforce Performance Management**

Managers and workers use the self-service Talent Management function to access their Talent Management Task Lists. The list contains tasks, such as Set Objectives and View and Track Objective Progress, that drive the performance-management activity for a single PMP.

### **Questionnaire Administration**

HR Professional users define questionnaires for inclusion in appraisal templates using the self-service Create Questionnaire function. Appraisal questionnaires can include a

list of job-based career paths for discussion during the appraisal.

### **Competency Profile**

Managers can use the self-service Competency Profile function to update the competency profiles of their subordinates. Employees can use this function to update their own competency profiles.

### **Suitability Matching**

Managers and HR Professionals can use the self-service Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. The process uses factors such as a person's current role, a person's competency levels (as defined in their competency profile), and succession plans in identifying candidates and opportunities. Employees can use this function to find opportunities suited to their competency levels.

### **Education and Qualifications**

Managers can use the self-service Education and Qualifications function to update records of educational qualifications obtained by their subordinates. Employees can use this function to update their own records.

### **Other Professional Qualifications**

Managers can use the self-service Other Professional Qualifications function to update records of professional qualifications obtained by their subordinates. Employees can use this function to update their own records.

### **Events and Bookings**

Managers can use the self-service Event and Bookings function to create events and event bookings for their subordinates. Employees can use this function to create events and event bookings for themselves.

### **Employee Reviews**

Both managers and employees can use the self-service Employee Review function to set up review meetings and invite reviewers to attend.

### **Work Preferences**

Managers can use the self-service Work Preferences function to enter work preferences (such as preferred work locations and work hours) for a subordinate. Employees can use this function to enter their own work preferences.

## Oracle Learning Management (OLM) and Talent Management

Oracle Learning Management (OLM), formerly Oracle Training Administration, is a complete system for the definition and delivery of training. OLM is tightly integrated with the talent-management functionality of HRMS. For example:

- When a learner completes a class, OLM can automatically update the learner's competency profile with the competencies and competency levels delivered by the class.
- An appraisal can include a learning path, which identifies classes to be taken by the appraisee.

Oracle Learning Management requires a separate license.

See: Introduction to Oracle Learning Management, *Oracle Learning Management User Guide*

## Reporting in Talent Management

The Talent Management functions together provide over 50 standard and HRMSi reports. These reports extract and present talent-management-related information about the individual and the enterprise.

See Reports and Processes in Oracle HRMS, *Oracle HRMS Window Navigation and Reports Guide*

## Talent Management Key Concepts

For more information about the Talent Management functions, see:

- Appraisals Overview, page 3-88
- Career Paths, page 3-121
- Competencies Overview, page 3-9
- Competency Profiles, page 3-29
- Event and Attendance Administration, page 3-127
- Qualification Types, page 3-81
- Suitability Matching, page 3-31
- Workforce Performance Management, page 3-37

## Talent Management Requirements

Oracle HRMS enables you to define all the components of a performance-management system to meet the needs of your enterprise. For example, you can keep a record of each worker's competencies, allocate and track objectives, and perform multiple types of appraisal.

### Can I define objectives once for the enterprise?

Yes. HR Professionals can define reusable objectives in the Objectives Library. Managers and workers can copy objectives from the Objectives Library to workers' *personal scorecards* of objectives.

### Can I allocate objectives automatically to my workforce?

Yes. When you create a Performance Management Plan (PMP), you identify the members of the plan (for example, all members of an organization or all workers in a specified supervisor hierarchy) and indicate whether the plan members should automatically receive objectives from the Objectives Library for which they are eligible.

### Can I track worker progress with objectives?

Yes. Throughout the performance-management period, managers and workers can both view and update a worker's progress. For example, a worker can indicate that an objective is 50 percent complete, and the worker's manager can view this information.

### What are the advantages of the competency functions?

The Oracle HRMS competency functions enable you to:

- Identify and measure consistently the knowledge, skills, and behavior displayed by your workers across the enterprise.
- Speed the deployment process within your enterprise and reduce recruitment costs. You can identify and select workers and applicants on a common basis and match them with opportunities that arise across the whole enterprise. This ensures that an able candidate is not rejected because of a mismatch for one vacancy when other suitable vacancies exist.
- Ensure your enterprise meets its business goals. You do this by linking the competencies held by your workers into the competencies required to meet the business goals of your enterprise.

## Can I perform competency evaluation during appraisals?

Yes. Oracle HRMS's highly configurable web interface enables you to perform competency-based evaluation as part of the appraisal process. You create appraisal templates, which can include competency assessment templates, to define the structure of the appraisal.

## To what extent can the appraisee be involved in the appraisal process?

In HRMS, the appraisal is the product of collaboration between the main appraiser and the appraisee. The main appraiser *shares* the appraisal with the appraisee and specifies which sections of the appraisal the appraisee can view, whether the appraisee can update the appraisal, and whether the appraisee can provide feedback on their final ratings. The appraisee, after making any permitted changes to the appraisal, *shares* the appraisal with the main appraiser to return it. This sharing of the appraisal between the main appraiser and the appraisee can occur as often as necessary during a single appraisal process.

The sharing functions, combined with the appraisee feedback function, encourage discussion throughout the appraisal process. Nonetheless, the appraisals functions are flexible enough also to support the traditional appraisal model, where dialog between the main appraiser and the appraisee is less important. In allowing the main appraiser to select which information to share and when, HRMS gives the main appraiser complete control of the appraisal process.

## Can I create appraisals efficiently?

Yes. Managers and workers can create individual appraisals using the self-service Appraisals function. Alternatively, the application can create appraisals automatically for all members of a PMP.

## Can I define my enterprise's career paths in Oracle HRMS?

Yes. Oracle HRMS enables you to define career paths based on either job progression or position progression. You use the model that best reflects the structure of your enterprise.

## Can I link competencies to qualifications?

Yes. You can link a person's acquisition of competencies to their achievement of formal qualifications, typically awarded by external, nationally recognized bodies. Such competencies have well defined performance standards that an assessor uses to determine whether a person has achieved a competency. Thus, you can measure workforce competencies against both enterprise *and* industry or national standards. You can encourage your workforce to acquire such qualifications by developing related competencies, thereby improving the enterprise skill base.

## How can I use Oracle Learning Management (OLM) to help with talent management?

OLM enables you to record the competencies that a course is expected to deliver. You can then use this information to update the competency profiles of the learners who have attended a class.

**Important:** This software should not be used as the sole method of assessment for making judgements about hiring, performance, or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.

It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.

All personal information that you store or use with this software must be up to date, accurate and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

## Can I use HRMS Intelligence to investigate and monitor career management?

Yes. HRMS Intelligence Reports, Discoverer Workbooks, and Performance Measures enable you to investigate competencies, proficiencies, appraisal activity, and training in your enterprise. You can use HRMS Intelligence to answer business questions such as:

- Who has the required competencies for the job?
- How quickly can I improve the skills of a group of people, and at what cost?
- How do a worker's competencies compare with those required by a particular job?
- Do my employees need more training?

## I need to enter competency information from a third-party skills vendor. How can I do this efficiently?

You can quickly and efficiently load competency details from a third-party skills vendor directly into Oracle HRMS using Web Applications Desktop Integrator (Web ADI). Web ADI enables you to manipulate and upload competency information, such as rating scales, rating levels, and competencies, from a text file or spreadsheet into the application. This means you can automatically load data into the application without having to enter the details individually.

See: Uploading Third-Party Competency Information, page 3-21

# Competencies

## Competencies Overview

In Oracle HRMS, a competency is any measurable behavior or ability that is required by the enterprise and that a worker demonstrates in the work context. For example, a competency can be:

- Knowledge (such as knowledge of consumer-protection or taxation laws)
- A skill (such as negotiation or critical thinking)
- An attitude (such as tenacity or commitment)
- An attribute (such as absence of color blindness or perfect pitch)

Competency definitions are the basis of many talent-management activities. In particular, you can define:

- A *competency profile* for each worker showing the worker's level of proficiency in various competencies

See: Competency Profiles, page 3-29

- The *competency requirements* of a business group, organization, job, or position to enable you to identify suitable candidates for vacancies and assess workers against these requirements.

See: Competency Requirements, page 3-23

## Global and Local Competencies

You can define competencies that are available to a particular business group only. Alternatively, you can create global competencies, which are available throughout the enterprise, provided that your system administrator has:

- Set the HR:Cross Business Group profile option to Yes
- Identified a global competence key flexfield structure on the HR:Global Competence Flex Structure profile option

Global competencies are most useful if your enterprise operates in multiple countries but you want to use the same competency definitions in all legislations.

## Competency Measurement

The HRMS competency functions enable you to set performance expectations for your

workers that are consistent and objective.

During appraisal activities, HRMS enables you to assess the degree to which a worker possesses a competency. For example, for the negotiation skills competency, a worker's proficiency level could be 3 on a scale of 1 through 5, where 5 indicates the greatest expertise.

See: Competency Measurement, page 3-12

## Defining Competencies

You can define competencies individually in the Competencies window. Alternatively, you can upload multiple global competencies from third-party suppliers using the Oracle HRMS Web ADI interface. This approach may be useful to enterprises implementing competency support for the first time.

See: Defining Competencies, page 3-16 and Uploading Third-Party Competency Information, page 3-21

## Unit Standard Competencies

Some legislations identify a special type of competency known as a *unit standard competency*. (A Unit Standard is typically a nationally registered document that describes performance standards for a competency. Industry representatives define and maintain the Unit Standard.)

A formal qualification results from the achievement of one or more unit standard competencies. Such qualifications are registered with a national Qualifications Framework, which identifies, for example, the number of credits attached to the qualification and to its constituent competencies, the awarding body, and the field of learning to which the qualification belongs.

## Competency Types

If your enterprise defines many competencies, you may find it helpful to classify them by type. For example, you can define a competency type of Language Skills to include any language competency that your enterprise values (such as written Spanish, spoken Spanish, written Japanese, spoken Japanese, and so on). You can then retrieve competency definitions by type.

See: Competency Types, page 3-15

## Rating Scales

Rating scales describe competencies and objectives in a general way.

Rating scales are of three types:

- **Proficiency scales** measure a person's mastery of a skill or technique. For example, a person's management skills could be:
  1. Basic
  2. Good
  3. Excellent
  4. Expert

You apply proficiency rating scales to competencies only. You can apply a single proficiency scale to multiple competencies. (Alternatively, you can define proficiency levels that are unique to a competency. See: Competency Measurement, page 3-12)

You can measure unit standard competencies using proficiency rating scales. You may want to measure all enterprise competencies using the same scale, for example. However, you must also define outcomes and assessment criteria for unit standard competencies if they are to lead to formal qualifications.

- **Performance scales** measure a worker's *delivery* of a competency or objective. A worker's competency can rank high on a proficiency scale but less high on a performance scale, or low on a proficiency scale but much higher on a performance scale. You can select a performance rating scale when defining competency assessment templates, objective assessment templates, and appraisal templates.
- **Weighting scales** measure the importance of a competency to the enterprise. For example, a competency's importance could be one of:
  1. Low
  2. Medium
  3. High

A skill that is extremely important to the enterprise would attract a higher weighting than one that is occasionally relevant or of minor importance. You can select a weighting scale when defining a competency assessment template.

**Note:** You can also apply weighting values to objectives. However, you do not use weighting scales. Instead, the lookup HR\_WPM\_WEIGHTING defines a single scale for use throughout the enterprise.

You can create rating scales that are available to a particular business group only, or, if your system administrator has set the HR: Cross Business Group profile option to Yes, you can create global rating scales that are available to all organizations within your

enterprise. If you use more than one rating scale of a particular type (for example, if you use multiple proficiency rating scales), ensure they are comparable by giving high numbers to high ratings and low numbers to low ratings.

## Default Rating Scales

When you define a proficiency, performance, or weighting scale, you can make it the default scale of that type either within the current business group or globally. A default rating scale applies only when you define competencies.

## Rating Scale Attachments

You can add attachments to rating scales. For example, you can attach a competency or objective description or a video of a person demonstrating a skill.

## Competency Measurement

To measure competencies, you can define:

- **Proficiency levels**, which are specific to a single competency
- **Proficiency rating scales**, which you can apply to multiple competencies

## Proficiency Levels

Each proficiency level that you define for a particular competency has a brief description and a detailed behavioral indicator that enables an assessor accurately to identify a worker's proficiency level.

The following table shows proficiency levels and behavioral indicators for the competency Merchandise Display.

Level	Description	Behavioral Indicator
1	Novice	Has no or minimal merchandise-display experience. Has completed no recommended training.
2	Beginner	Has completed five or fewer merchandise-display activities. Has completed training level 1.

<b>Level</b>	<b>Description</b>	<b>Behavioral Indicator</b>
3	Intermediate	Has completed 20 or fewer merchandise-display activities. Has completed training level 2.
4	Advanced	Has significant merchandise-display experience. Has completed training level 4 and trains junior staff. The worker's merchandise displays are known to improve sales of displayed items.
5	Expert	Is an acknowledged expert by his or her peers inside and outside the enterprise. Has significant merchandise-display experience. Has completed training level 6 and trains both junior and senior staff.

The behavioral indicator for each proficiency level is detailed and specific: you could not apply these behavioral indicators unaltered to a different competency.

Proficiency levels are part of the competency definition.

See: Defining Competencies, page 3-16

## Proficiency Rating Scales

Each level in a proficiency rating scale comprises a brief description and can include a behavioral indicator. However, the behavioral indicators are general enough to enable you to apply the scale to multiple competencies. For example:

<b>Level</b>	<b>Description</b>	<b>Behavioral Indicator</b>
1	Novice	Cannot work unsupervised.
2	Beginner	Can perform simple tasks unsupervised, but generally requires guidance.

<b>Level</b>	<b>Description</b>	<b>Behavioral Indicator</b>
3	Intermediate	Can perform basic tasks unsupervised, but requires guidance for more complex tasks.
4	Advanced	Can perform most tasks unsupervised, but requires occasional guidance.
5	Expert	Can perform all tasks unsupervised, and supervises others.

As this rating scale lacks detail relevant to a specific competency, you could apply it to various competencies, such as Negotiating with Suppliers, Planning Store Layouts, and Inventory Control.

See: Rating Scales, page 3-10

## Which Method of Measurement?

Proficiency levels are suitable if your enterprise competencies are varied and you want to define accurately what is expected of your workforce. The result is multiple, equivalent measurement systems. Proficiency rating scales are suitable if generic proficiency levels provide enough detail for your purposes and if consistency of measurement is important.

You can use both methods. For example, you could use a proficiency rating scale for your core competencies and proficiency levels for specific job or position competencies. Whichever approach you adopt, give high numbers to high ratings and low numbers to low ratings, so that analysis of the ratings gives consistent and sensible results.

## Measuring Unit Standard Competencies

For unit standard competencies, which can lead to formal qualifications, you must define outcomes and specify assessment criteria. Outcomes are nationally defined behaviors or performance standards specific to the unit standard competency. Each outcome has a set of assessment criteria. A registered assessor (from the awarding body, for example) determines whether a worker has achieved the unit standard competency by measuring the outcomes using the assessment criteria.

You can also measure unit standard competencies using proficiency levels or proficiency rating scales. For example, you may want to measure all enterprise competencies using a general rating scale, regardless of whether they lead to formal

qualifications. However, the proficiency rating scale or proficiency levels must be in addition to the outcomes and assessment criteria you define for unit standard competencies.

## Assessing Competencies

During an appraisal, you assess a worker's competency levels using the measurement scheme defined for each competency.

See: Assessing Competencies and Objectives, page 3-115

## Competency Types

Enterprises that make full use of the Oracle HRMS competency functions may create or import many competency definitions. For example, you can define the competencies required by each grade of every job or position in your enterprise. For ease of management and retrieval, you can group competency definitions into *competency types*. The types themselves are for you to define. For example, you can define competency types to differentiate various skill sets, such as management skills, language skills, neonatal nursing skills, retail management skills, and so on. Alternatively, you can define a competency type for each job or position, such as sales manager, department manager, sales assistant, area manager, and so on. A competency can belong to more than one type, and overlap between types is likely to occur.

You can retrieve competencies by competency type when searching for competencies:

- In the Find Competencies window  
See: Querying Competencies, page 3-20
- To include in the Competencies section of an appraisal when defining a competency assessment template  
See: Assessment Templates, page 3-111

You can update a competency-type definition unless you have included the competencies belonging to a type in a current assessment template. This restriction prevents use of the type in multiple templates giving different results.

## Defining Rating Scales

Use the Rating Scales window to define performance, proficiency, and weighting scales.

### To define a rating scale:

1. Enter a name and description for the rating scale.
2. Select the rating-scale type.

3. Select Default Rating Scale to make this rating scale the default of its type either within the business group or globally.
4. To make this rating scale available to all enterprise business groups, select Global.  
**Note:** You cannot change this selection after saving the rating scale. You can create global rating scales only if the HR: Cross Business Groups profile option is set to Yes.
5. Enter the first level and level name. For example, enter 1 in the Level field and Novice in the Name field.
6. In the Behavioral Indicator field, describe the behaviors that define this performance level (for example, the worker cannot work unsupervised). You can enter up to 2000 characters in this field.
7. Save your work.
8. Repeat Steps 5 through 7 for subsequent levels until the rating scale is complete.
9. To add attachments to the rating scale, position the cursor in the rating-scale name field and click the Attachments icon to open the standard Attachments window.
10. Save your work.

## Defining Competencies

Use the Competencies window to define competencies.

### To define a competency:

1. Select New in the Find Competencies window.
2. Select either Local or Global in the Scope region.
  - A local competency is visible only within the current business group, and the competency key flexfield for the business group defines the competency name structure.
  - A global competency is visible to all business groups in your enterprise. You can select Global only if your system administrator has set the HR: Cross Business Group and HR: Global Competency Flex Structure user profile options to Yes. The global competency key flexfield defines the competency name structure.

**Note:** After saving a competency, you cannot change its scope.

If you change your scope selection before saving the competency, Oracle HRMS deletes any information that you have entered in the Name, Rating Scale, and Primary Evaluation Method fields.

3. Click in the Name field, and complete the fields in the Competence Flexfield window.
4. Enter a description for the competency.
5. If you use Oracle Projects, enter a name or code in the Alias field to identify the competency. Otherwise, leave the field blank.
6. If you are defining a unit standard competency, select Unit Standard in the Cluster field.

**Note:** After saving a competency, you cannot change its cluster value from Unit Standard to any other value.

### **Entering Rating or Proficiency Information**

7. On the Valid Date and Proficiency tab, enter the dates between which the competency is valid. You must enter a start date, but you can leave the end date blank.
8. You can either select a general rating scale or define proficiency levels specific to this competency.

**Note:** This step applies primarily to competencies that are not unit standard competencies. Although you can select a rating scale or specify proficiency levels for a unit standard competency, you must also complete the tasks described in Entering Outcomes and Assessment Criteria, page 3-19.

To select a rating scale:

1. Select the Scale option.
2. If you have defined a default proficiency rating scale for this type of competency (local or global), its name appears automatically in the Rating Scale field. Otherwise, select a rating scale.
3. To view the selected rating scale, click Levels.

To specify proficiency levels:

1. Select the Levels option.
2. Click Levels to open the Levels window.
3. Define the first proficiency level by assigning a level number (for example, 0), a name (for example, Beginner), and a behavioral indicator (for example, the worker has no experience of inventory management and cannot perform basic tasks without supervision). Repeat this step for other proficiency levels.

### **Entering Competency Evaluation Details**

9. Select the main method of evaluating the competency (for example, Written Examination or Peer Assessment).
10. To specify when the competency must be reassessed, enter a number in the Renewal Period field and select a unit. For example, enter 5 in the Renewal Period field and select Year if you assess the competency every 5 years.
11. Select Certification Required if you need a certificate to confirm possession of the competency. For example, you may need a driver's license to prove competency to drive.

If you select Certification Required, enter the certification method and date whenever you include this competency in a worker's competency profile.

12. Save your work.

The rest of this topic applies only if you are defining a unit standard competency.

### **Entering Qualifications Framework Details**

**Note:** This section applies only if you are defining a unit standard competency.

13. Click the Unit Standard Qualifications Framework Details tab.
14. In the Unit Standard ID field, enter the Qualifications Framework code for the competency.
15. Select the main and subsidiary fields of learning to which the competency belongs.  
The main field of learning identifies the industry or sector to which the competency belongs (for example, Management Studies or Nursing).

The subsidiary field identifies the subject area within the field of learning to which the competency belongs (for example, Marketing or Neonatal Care).

16. Select the level type and level.

Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a competency could be at Level 6 on a scale ranging from Level 1 through Level 8.

The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).

17. Select the credit type and enter the number of credits this competency earns.

The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a unit standard competency.

18. Select the codes that identify the provider of the unit standard competency and the provider's Quality Assurance (QA) organization.

### **Entering Qualifications Information**

**Note:** This section applies only if you are defining a unit standard competency.

19. Click Qualifications to open the Competency Qualifications window.
20. In the Qualification Links region, select the name of a qualification to which this unit standard competency contributes.  
The identifier of the selected qualification appears automatically.
21. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
22. Repeat Steps 20 and 21 for additional qualifications. (A single unit standard competency can contribute to more than one qualification.)
23. Save your work.

### **Entering Outcomes and Assessment Criteria**

**Note:** This section applies only if you are defining a unit standard competency.

24. Click Outcomes to open the Outcomes and Assessment Criteria window.
25. Enter the number and name of a behavior or performance standard (for example, "Audience response above average" for a presentation skills competency).

26. Enter the dates between which the outcome is valid. You must enter a start date, but you can leave the end date blank.
27. In the Assessment Criteria field, define how to assess the outcome (for example, the audience rating for a minimum of three presentations is 60% or higher). This information must help an assessor decide whether an outcome has been achieved.
28. Repeat Steps 25 through 27 for additional outcomes.
29. Save your work.

## Querying Competencies

When you open the Competencies window, the Find Competencies window opens automatically.

You can query competencies by specifying any combination of:

- Full or partial competency name
- Competency type
- Qualifications Framework qualification, which limits the search to unit standard competencies that are linked to the qualification
- Organization, job, or position, which limits the search to the competency requirements of the specified work structure

### To query a competency:

1. Specify a scope value:
  - Local limits the search to competencies in the current business group.
  - Global limits the search to competencies defined as global.
2. Enter your search criteria.
3. Click Find.

The first competency that matches your search criteria appears in the Competencies window. Scroll through additional matching competencies using the Down Arrow key.

The competency name comprises the values you entered in the Competency Flexfield window when you created the competency. For example, if the Competency Flexfield window has one required field and two optional fields, and

you enter the competency name Teamwork in the required field and leave the optional fields blank, the competency appears in the Competencies window as "Teamwork ..", where two dots represent the empty optional fields.

## Uploading Third-Party Competency Information

The Upload Third Party Skills function enables you to upload global competency definitions and rating scales from a text file or spreadsheet to Oracle HRMS using Oracle HRMS Web Applications Desktop Integrator (Web ADI).

See: *Data Upload Using Web ADI, Oracle HRMS Configuring, Reporting, and System Administration Guide*

1. If you intend to upload competency information from a text file, then ensure the text is formatted correctly.

See: *Format of Text Files, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Otherwise, you can enter competency information directly into the spreadsheet that Web ADI creates.

2. Select Upload Third Party Skills from the Career Management menu, and follow the on-screen instructions to populate the spreadsheet.

**Note:** Select an appropriate integrator and layout for the competency-information type that you want to upload. For example, select Upload Third Party Rating Scale integrator to upload rating scales.

3. Upload the spreadsheet contents to Oracle HRMS.

See: *Uploading Data Using Web ADI, Oracle HRMS Configuring, Reporting, and System Administration Guide*

If the upload fails, correct any errors in the spreadsheet and retry the upload. Diagnostic messages appear in the Messages column at the end of each spreadsheet row.

## Grouping Competencies into Types

Use the Competence Types window to group competencies into types.

Before you can perform this task, your system administrator must have added the enterprise competency types to the lookup COMPETENCE\_TYPE.

**To group competencies into types:**

1. Query the competency type.
2. Select competencies to include in this competency type.
3. Save your work.

Competencies that you do not add to a competency type belong to the type **Other** by default.

# Competency Requirements

## Competency Requirements

A worker's competency profile identifies competencies that the worker possesses and records the worker's proficiency level in each competency. You can also define the enterprise's *competency requirements*, which are competencies the workforce must have to deliver business success. You can use this information in various ways. For example:

- You can search for candidates for vacancies and opportunities for workers, and identify the best match between the requirements of a role and the skills and experience of the worker.
- When assessing workers during appraisals, you can compare worker competencies with the requirements and proficiency levels for their roles. Having a benchmark statement of requirements that is based on business need brings consistency and objectivity to the appraisal process.
- You can target training and other development activities to close the gap between a worker's competencies and those required by the enterprise.

You can define your competency requirements for:

- Business groups
- Organizations
- Jobs
- Positions

In addition:

- If you use Oracle iRecruitment, you can define competency requirements for vacancies.

See: *Creating and Maintaining Vacancies, Oracle iRecruitment Implementation and User Guide*

- When using the Oracle SSHR Suitability Matching function, you can construct one-time lists of competency requirements when searching for:
  - Workers who meet those requirements
  - Work opportunities that require those competencies

See: *The SSHR Suitability Matching Function*, page 3-24

## Business Group (Core) Competencies

Competency requirements that you define for the business group are referred to as *core competencies*. Typically, core competencies are generic and fundamental to your enterprise strategy. For example, communication skills, negotiation skills, and quality focus may be suitable core competencies in your enterprise. Every member of the business group should demonstrate the core competencies, though the degree of proficiency can vary with seniority and experience. When you define the core competencies, you specify maximum and minimum proficiency levels to encompass the acceptable range.

## Organization, Job, and Position Competency Requirements

Competency requirements that you define for organizations apply to all members of the organization but are not core competencies. Competency requirements that you define for jobs and positions apply to all holders of those roles. You can also define competency requirements for particular grades within job or position. Position competency requirements automatically include the requirements of the associated business group, organization, and job.

## Essential Competencies

You can designate any competency requirement as essential. The Suitability Matching function identifies workers who possess essential competencies separately from those who possess desirable (nonessential) competencies.

See: The SSHR Suitability Matching Function, page 3-24

## How HRMS Uses Competency Requirements

The SSHR Suitability Matching and Appraisals functions are the primary users of competency requirements.

## The SSHR Suitability Matching Function

The Suitability Matching function, which you can access from HR Professional, Employee, and Manager Self-Service menus, enables you to find workers for opportunities and opportunities for workers. The application performs this function by comparing worker competency profiles with the competency requirements of business groups, organizations, jobs, positions, and vacancies. The comparison varies with each suitability-matching action. For example, for the action Find Suitable People by Role, you can search for a worker who matches the requirements of an organization only or of a job, position, or vacancy within that organization. You can also include the core competencies in the list of requirements to match.

When you perform the search for workers who match your competency requirements,

HRMS identifies workers who:

- Meet all essential and desirable competency requirements
- Meet all essential competency requirements
- Meet all desirable competency requirements
- Meet some or no essential or desirable competency requirements

See: Suitability Matching, page 3-31

## The Appraisals Function

When you perform an appraisal, you can assess a worker against the competency requirements of their job or position by selecting Include Job Competencies in the competency assessment template. This selection causes the core competencies, any organization competency requirements, and the job or position competency requirements to appear in the Competencies section of the appraisal. You can use the appraisals function View Competency Gaps to identify areas for development and select training to address deficiencies.

## Reporting on Competency Requirements

HRMS can generate several reports that analyze competency profiles and competency requirements to provide business intelligence.

### Workforce Intelligence Reporting

The Competence Requirement worksheet in the Competence (Skill) Development Detail Workbook lists the competency requirements of all organizations, jobs, positions, and grades in a business group.

See: Competence (Skill) Development Detail Workbook, page 3-132

### Workforce Intelligence (HRMSi) Reporting

The Competence Match (Organization Hierarchy) Status Analytics Workbook provides various analyses of worker competency profiles compared with the requirements of their roles within an organization hierarchy.

See: Competence Match (Organization Hierarchy) Status Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

## Defining Core Competencies

Core competencies are those required by every member of a business group, and you define them for the business group.

Use the Competence Requirements window.

**To define core competencies:**

1. In the Business Group field, select a business group.
2. Click Find to display any competency requirements already defined for this business group. If the application displays existing competency requirements, you can:
  - Delete or edit existing competency requirements. To delete an existing core competency, select the competency and click the Delete icon.
  - Define additional competency requirements.
3. To define a core competency, click the first empty row of the competency table and select a competency.
4. In the Low and High fields, select the extents of the rating scale that are desirable for this competency in this business group.
5. If all workers in this business group *must* possess this competency, then select Essential. When performing suitability matches, the application lists workers who possess essential competencies separately from those who do not.
6. Enter the date from which this competency is required in this business group.
7. Repeat Steps 3 through 6 to define additional core competencies for this business group.
8. Save your work.

**What's Next**

You can also define competency requirements for organizations, jobs, and positions.

See: Defining Organization, Job, and Position Competency Requirements, page 3-26

**Defining Organization, Job, and Position Competency Requirements**

You can identify the competencies that workers in an organization or holders of jobs or positions must possess. When you use the Suitability Matching function or advertise a vacancy, the application can compare worker competencies with the competency requirements for an organization, job, or position to find suitable candidates.

Use the Competence Requirements window.

### **To define competency requirements for an organization, job, or position:**

1. Select the organization, job, or position.
2. Click Find to display existing competency requirements. Note that positions inherit competency requirements defined for the business group (the core competencies), organization, and job with which they are associated. If the application displays existing competency requirements, then you can:
  - Delete or edit existing competency requirements. To delete an existing competency requirement, select the competency and click the Delete icon.
  - Define additional competency requirements.
3. To define a competency requirement, click the first empty row of the competency table and select a competency.
4. In the Low and High fields, select the extents of the rating scale that are desirable for this competency in this organization, job, or position.
5. If all workers in this organization, job, or position must possess this competency, select Essential. When performing suitability matches, the application lists workers who possess this competency separately from those who do not.
6. For jobs and positions only, select a grade, if appropriate.
7. Enter the date from which this competency is required.
8. Repeat Steps 3 through 7 to define additional competency requirements for this organization, job, or position.
9. Save your work.

### **Related Topics**

[Copying Competency Requirements, page 3-27](#)

## **Copying Competency Requirements**

You can copy the core competencies (those defined as required for the business group) or competency requirements defined for an organization, job, or position to another organization, job, or position.

Use the Competence Requirements window.

**To copy competency requirements:**

1. Select the organization, job, or position to which you want to copy competency requirements.
2. Click Copy Competencies.  
The Copy Competencies window opens.
3. To copy the core competencies, leave Core Competencies selected. Otherwise, deselect core competencies and select the organization, job, or position from which you want to copy the competency requirements.
4. To copy the proficiency levels, leave Copy Levels selected. Otherwise, deselect this value. Note that, if you copy the proficiency levels, then you can edit them after copying.
5. Specify the date from which these competency requirements apply to your organization, job, or position.
6. Click Copy Competencies.
7. Edit or delete any of the copied competency requirements, if required. For example, you may want to enter a grade for competency requirements that you copy to a job, change the validity dates of a requirement, or delete duplicate requirements.
8. Repeat this procedure from Step 2 to copy additional competencies, if appropriate.
9. Save your work.

## Viewing Competency Requirements

Use the Competence Requirements window to view competencies required at the business group, organization, job or position level.

**To view competency requirements:**

1. Select the business group, organization, job, or position.
2. Click Find.  
The application displays competency requirements defined for the specified work structure.

# Competency Profiles

## Competency Profiles

A competency profile is a list of a worker's competencies showing the worker's level of proficiency in each competency. For unit standard competencies, which the worker usually acquires in increments, the competency profile shows whether the competency is In Progress or Achieved.

## Setting Up the Competency Profile

You can create a worker's competency profile when the worker first joins the enterprise using details from the worker's resume, tests, or interviews. You can also copy competency requirements from a vacancy definition in Oracle iRecruitment to a competency profile.

## Copying Core or Primary Assignment Competencies to the Competency Profile

Some competencies are important for all employees throughout your enterprise. Such competencies are referred to in Oracle HRMS as *core competencies*, and you define them as competency requirements for the business group. Other competencies are required for particular organizations, jobs, positions, or grades within job or position. You can copy both the core competencies and any competency requirements associated with a worker's primary assignment to the worker's competency profile. This feature enables you to set up a worker's competency profile efficiently and ensures that you assess the worker's proficiency in all relevant competencies.

See: *Creating a Competency Profile*, page 3-32

## Maintaining Competency Profiles

You can update a worker's competency profile at any time using:

- The Manager Self-Service Competency Profile function
- The Employee Self-Service Competency Profile function
- The Competence Profile window in the forms-based interface

If you need to recertify a competency at intervals (for example, annually), then you can define a periodic alert (using Oracle Alert) to notify you as the recertification date approaches.

## Assessing Competencies in an Appraisal

You can assess a worker's competencies during an appraisal if you include a

competency assessment template in the appraisal template. Otherwise, no Competencies section appears in the appraisal. Competency assessment templates can include some competencies (for example, those required by a worker's job) by default. You can update the Competencies section for a worker during the appraisal process. For competencies already included in the worker's competency profile, the worker's current proficiency level appears in the Competencies section of the appraisal.

See: *The Appraisal Template*, page 3-109 and *Assessment Templates*, page 3-111

HRMS can update a worker's competency profile automatically after an appraisal. You can enable this feature at site level by setting the user profile option *Apply Assessment Competencies to Person* to Yes.

See: *Setting Up the Appraisal Process*, page 3-105

Alternatively, you can enable this feature at appraisal level by selecting *Update Competency Profile* in the appraisal template.

See: *The Appraisal Template*, page 3-109

When you enable this feature, HRMS writes the new proficiency level (allocated to the worker on the *Final Ratings* page of the appraisal by the main appraiser) to the worker's competency profile.

## **The Competency Profile and Oracle Learning Management**

Training is the primary method of acquiring new skills and developing existing skills. Users of Oracle Learning Management can configure the application to update learners' competency profiles automatically on successful completion of training.

See: *Competencies, Oracle Learning Management Implementation Guide* and *Configuring Competency Update Automation, Oracle Learning Management Implementation Guide*

## **How HRMS Uses Competency Profiles**

The Oracle HRMS Self-Service Suitability Matching function enables you to:

- Find workers for opportunities.
- Find opportunities for workers.

The application performs this function by comparing worker competency profiles with the competency requirements of vacancies, jobs, and positions.

See: *Suitability Matching*, page 3-31

## **Reporting on Competency Status**

HRMS can generate several reports that analyze competency profiles and competency requirements to provide business intelligence.

## Workforce Intelligence Reporting

The Competence (Skill) Development Detail Workbook provides two worksheets of interest:

- The Person Competence Profile Worksheet identifies workers with similar competency profiles and enables you to compare the competency profiles of workers at the same grade.
- The Competence Delivered by Training Activity worksheet identifies competencies workers acquire by means of formal learning activities.

See: Competence (Skill) Development Detail Workbook , page 3-132

The Competence Updates after Appraisal workbook provides a summary of changes made to competency profiles (either automatically or manually) after appraisal completion.

See: Competence Updates after Appraisal Workbook, page 3-135

## Workforce Intelligence (HRMSi) Reporting

The Competence Levels (Organization Hierarchy) Detail Analytics Workbook displays, for an organization hierarchy, each worker's proficiency level in a selected competency.

See: Competence Levels (Organization Hierarchy) Detail Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

The Competence Match (Organization Hierarchy) Status Analytics Workbook compares the competency requirements of a job with the competency profiles of workers occupying that role.

See: Competence Match (Organization Hierarchy) Status Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

## Suitability Matching

The SSHR Suitability Matching function, which is available to HR Professionals, managers, and workers, enables you to compare a worker's competency profile and work preferences with the requirements of a work opportunity.

Depending on the responsibility used, the default Suitability Matching page offers users between four and ten suitability-matching options. For example, workers can use this function to search for work opportunities for themselves, and managers and HR Professionals can use this function to find candidates for work opportunities.

The available suitability-matching options are shown in the following table.

### ***Suitability Matching Options***

<b>Category</b>	<b>Option</b>	<b>Access by Responsibility</b>
Find a Person for a Work Opportunity	Find Suitable People by Role	Manager, HR Professional
Find a Person for a Work Opportunity	Find Suitable People by Competency	Manager, HR Professional
Find a Person for a Work Opportunity	Compare People by Current Role	Manager, HR Professional
Find a Person for a Work Opportunity	Compare Named Successors for a Position	HR Professional
Find a Person for a Work Opportunity	Compare Applicants for a Vacancy	Manager, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Role	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Competency	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Pending Applications	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Succession Options	HR Professional
Find a Work Opportunity for a Person	Compare Current Assignments	Manager, Employee, HR Professional

## **Creating a Competency Profile**

Use the Competence Profile window to create, view, and update a worker's competency

profile. Alternatively, you can use the SSHR Competency Profile function, which is available to both employees and managers.

The Competence Profile window displays all competencies, past and present, held by the worker. To see only current competencies and proficiency levels, select Current Competencies. If a worker has a competency profile in more than one business group, then you can see, but not update, any *global* competencies the worker acquired in other business groups.

To populate a worker's competency profile, you can:

- Add competencies individually to the profile.
- Copy competencies to the profile.

The amount of information you enter for a competency depends on the competency type: unit standard competencies require more information than non-unit-standard competencies.

See: Competencies Overview, page 3-9

### **To add individual competencies to a competency profile:**

1. Select the first competency this worker possesses.
2. Select the worker's proficiency level in this competency.
  - Note:** If you update a proficiency level, enter the date from which the new level applies. When you save the competency profile, HRMS automatically ends the previous proficiency level on the day before the new level starts.
3. Enter the date from which the worker possesses the competency at this level. You can enter an expiry date, if required.
4. In the Source of Proficiency Rating field, you can select the method, such as training course or previous experience, by which the worker gained the competency.

#### **The Status Field**

The Status field, which is read only, can contain the value Achieved or In Progress.

- When the worker has achieved all outcomes for a unit standard competency, its status is Achieved. Otherwise, its status is In Progress.

When you save the competency profile, Oracle HRMS changes the status of a unit standard competency from In Progress to Achieved if the person has achieved all outcomes for the competency.

- All non-unit-standard competencies have the status Achieved, by default.

When you add a competency to the profile, the Status field is blank. Oracle HRMS populates the field only when you save the competency profile.

### **Entering Certification Details**

5. Click the Certification tab.
6. Select the certification method (for example, examination) for the competency, and enter the certification date.
7. In the Next Review field, enter the date on which you must reassess the competency, if appropriate.

### **Viewing Qualifications Framework Details**

8. **Note:** This step applies to unit standard competencies only.

Click the Unit Standard Qualifications Framework Details tab.

The Qualifications Framework Details for the unit standard competency appear, including the number of credits associated with the competency, the field of learning to which the competency belongs, and the unit standard identifier.

9. Repeat from Step 1 to select additional competencies.
10. Save your work.

### **To record outcomes achieved:**

**Note:** This procedure applies to unit standard competencies only.

You record outcomes achieved towards a unit standard competency in the Outcomes Achieved window.

1. Select a unit standard competency and click the Outcomes Achieved button.
2. Select the name of the outcome achieved towards the selected unit standard competency.  
The assessment criteria for this outcome appear in the Assessment Criteria field.
3. In the Date From field, select the date on which the outcome was assessed as achieved.
4. If you must reassess the outcome at a future date, enter that date in the Date To field.

5. Repeat from Step 2 for additional outcomes for this unit standard competency.
6. Save your work.

If the worker has achieved all outcomes for a unit standard competency, Oracle HRMS updates the status of the competency to **Achieved** when you save the competency profile. Otherwise, the competency status remains **In Progress**.

### **To copy competencies to the competency profile:**

1. Click **Copy Competencies** to open the **Copy Competencies** window.
2. In the **Copy Competencies** window, do one of the following:
  - Select **Core Competencies** to copy competency requirements defined for the business group.
  - Select **Primary Assignment Competencies** to copy competency requirements from the organization, job, position, and grade to which the worker is assigned.
  - Select a vacancy to copy the competency requirements from a vacancy definition in Oracle iRecruitment. The application automatically copies competency requirements for the organization, job, position, and grade for which you defined the vacancy, in addition to any requirements that are specific to the vacancy.
3. Enter the dates between which the copied competencies are valid. You must specify a start date, but the end date is optional.
4. Click **Copy**.

You can delete or update any of the copied competencies (for example, by specifying proficiency levels and certification details).
5. Save your work.

## **Entering Work Preferences for a Worker**

You can record workers' preferences, such as their willingness to travel or relocate and their preferred working hours. When you use the **SSHR Suitability Matching** function to match workers to opportunities or find opportunities for workers, the application can take work preferences into account.

To enter work preferences, you can use the **Self-Service Work Preferences** function, which is available to both managers and employees.

In the forms-based interface, use the **Work Preferences** window, accessed from the **People** window.

**To enter work preferences for a worker:**

1. Select any relevant work capabilities. For example, if a worker will accept international travel but is not willing to relocate domestically, select Visit Internationally but leave Relocation Required for Position deselected.
2. Enter the worker's preferred working hours and work schedule.
3. Complete the International Deployment region if the worker is willing to relocate or travel internationally.
4. Save your work.

**Related Topics**

Entering Work Choices for a Job or Position, *Oracle HRMS Enterprise and Workforce Management Guide*

# Workforce Performance Management Overview

## Workforce Performance Management Overview

Successful enterprises set objectives for their workers that are consistent with the enterprise strategy and that contribute to business goals. To support enterprise-directed objective setting, management, and assessment, HRMS provides an integrated set of *Workforce Performance Management* functions. Enterprises can:

- Define objectives consistently and allocate them efficiently throughout the enterprise.
- Align worker objectives with the strategy and goals of the business.
- Track worker achievement of objectives.
- Assess worker performance in the delivery of objectives.

Workers can participate in the objective-setting process and understand how their performance contributes to business outcomes.

## The Performance-Management Process

Using Oracle HRMS, you manage workforce performance for a specified period of time, such as a calendar or financial year, and for a specified workforce, such as all workers in a supervisor hierarchy or in an organization. To define performance-management activities, the HR Professional creates a *Performance Management Plan (PMP)*, a configurable control document that can define:

- Objective-setting and objective-tracking processes
- Appraisal-management processes

You select both options in your PMP to take full advantage of the performance-management functions. Alternatively, you can define a PMP to manage objectives only or appraisals only. You can define as many PMPs as the enterprise requires, and a worker can belong to multiple PMPs. For more information, see *Performance Management Plans*, page 3-43

To start the performance-management process, the HR Professional *publishes* the PMP. At this point, the application:

- Creates a *personal scorecard* of objectives for each member of the plan.
- Generates a list of tasks for workers and managers that drive performance-management activities. Each task that the application generates

belongs to one of three processes:

- Objective Setting
- Objective Tracking
- Appraisal

### **The Objective-Setting Process**

During this process, which lasts for the period specified in the PMP, worker and manager update the worker's personal scorecard by adding, updating, or removing objectives. The personal scorecard transfers between worker and manager until the objective-setting process is complete. The manager then approves the worker's personal scorecard to change its status to Published.

### **The Objective-Tracking Process**

During this process, worker and manager can:

- View the worker's personal scorecard.
- Record progress made against each objective.

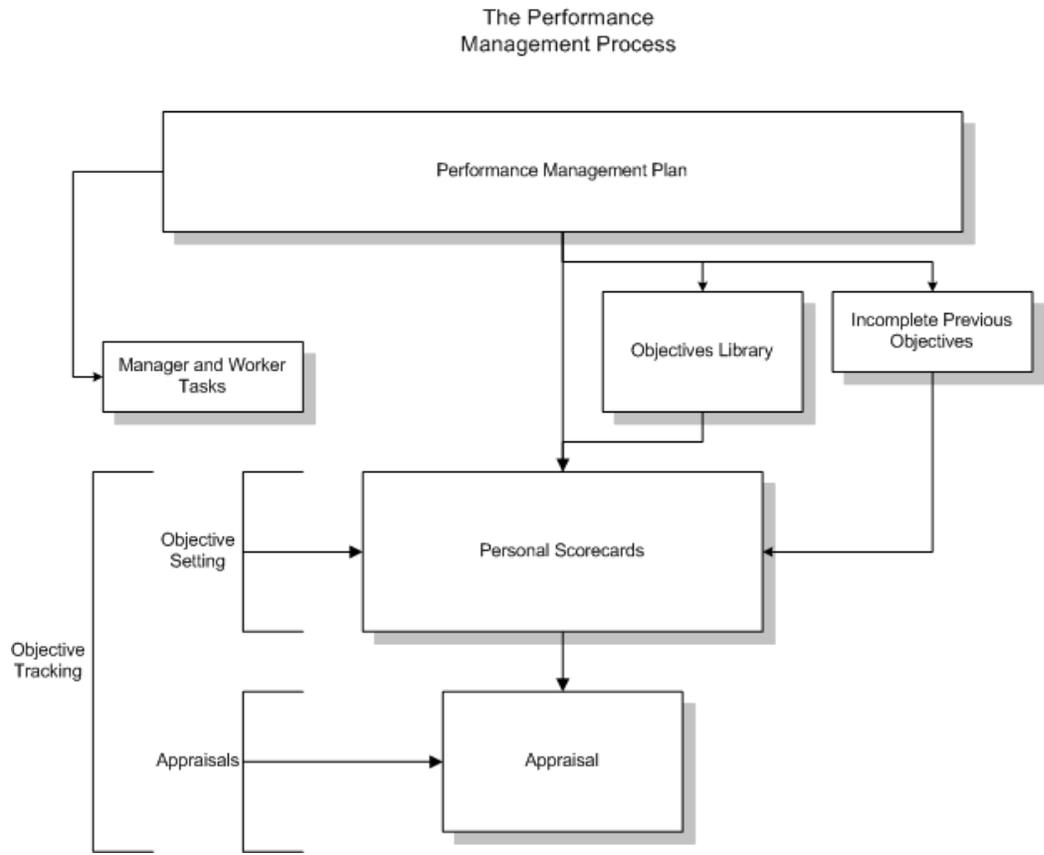
This process lasts throughout the performance-management period.

### **The Appraisal Process**

During this process, which can occur multiple times during the performance-management period:

- The application creates appraisals automatically for all PMP members on a date that you specify. The application copies the worker's personal scorecard of objectives to the Objectives section of the appraisal.
- Manager and worker conduct the worker's appraisal.

The following figure summarizes the HRMS performance-management process:



When you publish a PMP, the application generates tasks for workers and managers and a personal scorecard of objectives for each plan member. The application can copy to each personal scorecard:

- Objectives from the Objectives Library for which the worker is eligible
- Incomplete objectives from the worker's previous scorecard

Workers and managers complete worker scorecards during the objective-setting process and appraise performance during the appraisal process. Workers and managers can view personal scorecards and track progress throughout the performance-management period.

## Key Functions of HRMS Workforce Performance Management

HRMS provides a rich set of functions to support workforce-performance management and appraisal.

### The Objectives Library

HR Professionals can create a *library* of standard, reusable objective definitions for the enterprise to promote efficiency and consistency. Workers and managers can search this

library for objectives to copy to personal scorecards, and the application can automatically allocate objectives from the library to eligible workers.

To populate the library, HR Professionals can either create individual objective definitions or import them from other sources using Oracle Web ADI.

See: The Objectives Library, page 3-53

### **Automatic Allocation of Objectives**

HRMS can automatically allocate objectives from the Objectives Library to workers based on eligibility rules that you define in eligibility profiles. This function enables you to allocate some or all objectives efficiently throughout the enterprise.

See: Allocating Objectives to Workers Automatically, page 3-64

### **Objective Definition**

The HRMS objective-definition functions support the creation of specific, measurable, achievable, relevant, and time-based (SMART) objectives. For example, you can specify how you will measure achievement of objectives, include target dates, and mark objectives for inclusion in appraisals. You can also include links to attachments and provide supporting descriptions. Managers can define objectives for workers, and workers can define objectives for themselves, subject to management approval.

See: Creating Objectives, page 3-54

### **Cascade Objectives Through the Enterprise Hierarchy**

Managers can *cascade* their own objectives to workers reporting directly to them, either by duplicating their own objectives or by creating new, related objectives. Those workers can repeat the process for workers reporting to them, and so on throughout the enterprise hierarchy. Cascaded objectives constitute an objectives hierarchy, with each objective supporting an objective above it in the hierarchy.

See: Cascading Objectives, page 3-58

### **Define Relationships Between Objectives**

Workers can *align* their objectives with objectives that other workers have *shared* with them as a way of establishing a network of relationships between objectives. This approach may be useful in enterprises that use matrix-management techniques rather than standard reporting hierarchies.

See: Sharing and Aligning Objectives, page 3-67

### **Automatic Creation of Appraisals**

You can generate appraisals automatically from the PMP. HRMS creates appraisals on a specified date for all members of the PMP using the appraisal template that you select.

The application also assigns the appraisal to the initiator that you identify and automatically includes each worker's personal scorecard of objectives in the Objectives section of the appraisal. This approach is highly efficient, as individuals do not have to create appraisals or populate the Objectives section. It also enables you to enforce both the timing and the format of the appraisal. This function is completely integrated with and enhances the HRMS appraisal process.

See: The Appraisal Process, page 3-92

## Setting Up Workforce Performance Management

Before you can use the HRMS Workforce Performance Management functions, some setup steps are required.

To set up Workforce Performance Management:

1. Add the Objectives Library function to appropriate HR Professional menus. This function appears on HRMS Manager Career Management menus by default. As access to the function enables users to perform all objectives-library tasks, do not allow general access to this function.

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

2. Add the Performance Management Plans function to appropriate menus. This function appears on HRMS Manager Career Management menus by default. Access to this function enables users to create new plans and query plans to which they have access. Users can access plans that they administer and plans administered by people to whom they have access.

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

3. The Manage Appraisal Templates, Manage Objective Assessment Templates, and Manage Competency Assessment Templates functions appear by default on the HR Professional Responsibility menu. Add these functions to other menus, if appropriate.

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

4. HR Professionals can import objectives to the Objectives Library using Oracle Web ADI. Ensure that relevant users have access to Web ADI and that you have configured Web ADI correctly.

See: Implementing Web ADI for Use with Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

5. Populate the following lookups:

- **HR\_WPM\_MEASURE\_UOM**  
For objectives with a quantitative measurement style, this lookup identifies units of measure, such as percentage, weight, number, and currency values.
- **HR\_WPM\_PRIORITY**  
Using this lookup, users can allocate a relative priority to objectives (for example, low, medium, or high).
- **HR\_WPM\_GROUP**  
Using this lookup, users can group objectives into types (such as Communication, Management, and Personal Development).
- **HR\_WPM\_WEIGHTING**  
This lookup defines a scale of weighting values (integers) for use throughout the enterprise. For example, the values could be 1, 2, 3, 4, and 5, where the value 5 indicates an objective of greater importance than the value 1.

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

6. HRMS can allocate objectives to workers automatically based on eligibility profiles. To use this function, you must create eligibility profiles before creating the PMP.

See: Defining an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

7. On the Talent Management home page for managers, the Switch Manager function appears by default. This function enables a manager to work as another manager (typically one lower in the management hierarchy) and access that manager's performance-management tasks. To disable this function, personalize the Talent Management home page to remove the Switch Manager button.
8. When the application creates appraisals automatically from a Performance Management Plan or you run the Mass Appraisal Creation for WPM program, some errors are likely to occur and are to be expected. Therefore, you *must* set the action parameter Maximum Errors Allowed (MAX\_ERRORS\_ALLOWED) to a value that is realistic for the volume of data. Otherwise, the appraisal-creation process may fail.

**Note:** If your enterprise also runs payroll processes, Maximum Errors Allowed may already be set to an appropriate value.

To access the Action Parameters window, select Action Parameters from the Other Definitions menu.

# Performance Management Plans

## Performance Management Plans

The Performance Management Plan (PMP) defines the performance-management process for a specified period, such as a calendar year. It identifies:

- Who is a member of the plan
- Whether and how you will set objectives for plan members
- Whether the application will create appraisals automatically for plan members
- The tasks workers and managers will perform throughout the process

HR Professionals create and manage the PMP using the Performance Management Plans function.

## Specifying General Information

On the Create Plan: General Information page, you specify the:

- Plan name. As this name is also the name of each personal scorecard, devise a meaningful naming standard to identify the plan clearly.
- Plan administrator, who manages the plan (who can update it, for example) and is the signed-on user, by default. You can select a different administrator from the list of people your security profile enables you to access.

**Note:** If you are the plan administrator but are not a member of the plan, the plan does not appear automatically in your Talent Management Task List. You can use the Switch Manager function to access the plan as a manager who is a plan member.

- Previous plan. Provide this value if you want personal scorecards to include incomplete objectives from the scorecards of a previous plan.
- Plan start and end dates. These dates define the performance-management period. When you set these dates, allow sufficient time to complete any end-of-year appraisal activity. For example, a plan for 2006 could have a start date of 01 January, 2006, and an end date of 31 January, 2007, to allow time for the end-of-year appraisal.

You can also identify attachments to appear in each personal scorecard. For example, you could include information about defining SMART (specific, measurable, achievable,

relevant, and time-based) objectives or a document about the enterprise goals. Note that, when you duplicate a plan, the application does not duplicate attachments.

## Selecting the Plan Population

On the Create Plan: Population page, you identify the plan members by selecting part or all of a hierarchy (for example, an organization hierarchy). For workers belonging to this hierarchy, HRMS automatically generates personal scorecards of objectives when you publish the plan.

See: Personal Scorecards, page 3-70

## Specifying the Plan Process

On the Create Plan: Process page, you tailor the performance-management process to suit enterprise requirements. Briefly, you can:

- Include both objective setting and automatic appraisal creation.
- Exclude objective setting.
- Exclude automatic appraisal creation.

## Including both Objective Setting and Appraisal Creation

For the objective-setting process, you can specify:

- When objective setting must occur. The objective-setting period must be:
  - The same as or wholly within the plan period
  - Complete before any appraisal-task start date

The objective-setting period is usually at the start of the performance-management period. If your PMP includes multiple appraisal tasks, you may want to set multiple objective-setting periods. In this case, you update the published PMP to set the next objective-setting deadline.

See: Updating Performance Management Plans, page 3-48

If you also select Allow Changes Outside This Period, then workers and managers can update personal scorecards outside objective-setting periods. In this case, the end date of an objective-setting period is a proposed deadline only.

- Whether you will use the cascading or parallel objective-setting process. This selection determines who starts the objective-setting process (managers or workers).

See: Cascading Objectives, page 3-58

See: Setting Objectives in Parallel, page 3-62

- Whether personal scorecards will automatically include objectives from the Objectives Library for which workers are eligible.

See: Allocating Objectives Automatically, page 3-64

- Whether personal scorecards will include incomplete objectives (objectives with no achievement date). The application looks for these objectives in the worker's previous scorecard (identified on the Create Plan: General Information page).
- Whether sharing and alignment of objectives are enabled. These features enable workers to construct a hierarchy of related objectives.

See: Sharing and Aligning Objectives, page 3-67

When you publish the plan, the application generates objective-setting and objective-tracking tasks for plan members.

If you select Include Appraisals in Process, the application can create appraisals automatically for plan members. In a single PMP, you can define multiple appraisal tasks. For example, you can define midyear and full-year appraisals. For each appraisal task, you can:

- Select an appraisal template.

See: Selecting Appraisal Templates, page 3-46

- Specify when the application will generate the appraisals, by setting Create Appraisals to Yes and entering the number of days before the start of the appraisal task.
- Specify whether the application will allocate appraisals to the main appraiser or the appraisee.

For each appraisal, the task start date must be after the appraisal-period start date.

The application automatically configures the Objectives section of the appraisal using the objective-assessment template identified in the appraisal template, and populates the Objectives section with the worker's personal scorecard.

When you publish the PMP, the application generates appraisal-process tasks for plan members and schedules a concurrent process to create appraisals on the specified dates, if appropriate.

If you set Create Appraisals to No, the application does not create appraisals automatically for this plan. Instead, you can run the Mass Appraisal Creation for WPM program at a convenient time.

See: Running the Mass Appraisal Creation for WPM Program, page 3-52

## Excluding Objective Setting

If you do not include objective setting in your PMP, when you publish the plan the application:

- Generates personal scorecards and populates them with any incomplete objectives and automatically-allocated objectives. The scorecard status is Published.
- Does *not* generate objective-setting and objective-tracking tasks but does generate appraisal-process tasks.
- Generates appraisals on the specified dates, if you have set Create Appraisals to Yes. Otherwise, you can run the Mass Appraisal Creation for WPM program at a convenient time. The Objectives section of the appraisal includes personal scorecards as generated on plan publication.

See: Selecting Appraisal Templates, page 3-46

## Excluding Appraisal Creation

If you do not include appraisal creation in your PMP, when you publish the plan the application:

- Generates personal scorecards and populates them with any incomplete objectives and automatically-allocated objectives
- Does not generate appraisal-process tasks but does generate objective-setting and objective-tracking tasks
- Does not create appraisals automatically

You cannot run the Mass Appraisal Creation for WPM program to create appraisals for this plan.

If you create appraisals individually using the SSHR Appraisals function, the configuration of the Objectives section depends on the appraisal template you select. The application does not copy a worker's personal scorecard to the Objectives section as there is no link between personal scorecards and appraisals created outside the PMP.

## Selecting Appraisal Templates

Appraisal templates that you include in a PMP must:

- Be valid throughout the relevant appraisal period.

Assessment templates that you include in the appraisal template must also be valid throughout the appraisal period.

- Be valid for the plan population.

If your plan population spans multiple business groups, then you must select global appraisal templates. If your plan population is in a single business group only, then you can use either global or local appraisal templates. However, any local appraisal template must be from the same business group as the plan population.

If you include an appraisal template that is not valid for the plan population, then plan publication fails.

- Include an objective-assessment template, if you include objective setting in your PMP. Otherwise, HRMS cannot configure the Objectives section of the appraisal.

See: The Appraisal Template, page 3-109

## Reviewing the Plan

The Create Plan: Review page shows the tasks HRMS will generate for workers and managers when you publish the plan. The list of tasks varies according to configuration options selected on the Create Plan: Process page. For example, if you do not include objective setting in your performance-management process, the application does not generate objective-setting tasks.

## Publishing the Plan

A Performance Management Plan has no effect until you publish it. When you publish the plan, HRMS automatically generates personal scorecards for all plan members and a list of tasks to guide plan members through the performance-management process.

See: Personal Scorecards, page 3-70

See: Manager Performance-Management Tasks, page 3-73 and Worker Performance-Management Tasks, page 3-77

**Note:** Once you publish a plan, you cannot delete or deactivate it. Although you can update some parts of a published plan, you cannot make major revisions. Therefore, ensure your Performance Management Plan is complete and correct before you publish it.

## Monitoring the Plan

Once a plan is published, you can use the Performance Management Plans function to monitor the status of scorecards and appraisals generated by the plan.

## Updating the Published Plan

You can update a published plan, though there are significant restrictions on the

changes you can make.

See: Updating Performance Management Plans, page 3-48

## Updating Performance Management Plans

You can update a published Performance Management Plan (PMP) and republish it to disseminate relevant changes to plan members. For example, if you update a published plan to include objective setting, the application generates personal scorecards and objectives-related tasks when you republish the plan. However, some restrictions apply to the changes that you can make.

### Items You Can Change in a Published PMP

On the Create Plan: Process page, you can:

- Select, but not deselect, any of the following options:
  - Include Objective Setting in Process
  - Sharing and Alignment (if Include Objective Setting in Process is also selected)
  - Include Appraisals in Process
  - Allow Changes Outside This Period
  - Automatic Allocation
  - Notify Plan Population
- Change the objective-setting start date, provided that neither the current date nor the new date is in the past.
- Change the objective-setting deadline date, provided that the new date is before the task-start date of the next appraisal.
- Change Task Start Date in the Appraisals region, provided that the current date is not in the past and the new date is at least two days in the future.
- Change Task End Date in the Appraisals region.
- Add or delete an appraisal up to two days before that appraisal's Task Start Date, if Create Appraisals is set to Yes (indicating that the application is scheduling appraisal creation). If Create Appraisals is set to No, you can add or delete an appraisal provided that you have not already run the Mass Appraisal Creation for WPM program for that appraisal task.

On the Create Plan: General Information page, you can update the flexfield and any attachments. You cannot update the Create Plan: Population page in a published plan.

When you republish the plan, the application can include additional objectives in personal scorecards for which workers have become eligible since you last published the plan.

See: Updating Objectives, page 3-56

## Changing the Objective-Setting Deadline

When you change the objective-setting deadline date in a published PMP, HRMS needs to determine whether you are simply extending the current deadline or specifying a new objective-setting period.

If your new objective-setting deadline is before the first appraisal-task period following the previous objective-setting deadline, HRMS assumes that you are extending the current objective-setting period. In this case:

- If you do not select Reset Scorecard Statuses, then the new objective-setting deadline applies only to plan members who have not yet completed the objective-setting task; the application makes no changes to scorecard statuses.
- If you select Reset Scorecard Statuses, then the application resets the status of *all* personal scorecards to either With Worker or With Manager when you republish the plan so that all plan members can set objectives during the extended objective-setting period.

If your new objective-setting deadline is after the first appraisal task period following the previous objective-setting deadline (and that appraisal task is complete), HRMS assumes you are specifying a new objective-setting period for a subsequent appraisal task. In this case, the application automatically selects Reset Scorecard Statuses and resets the status of all personal scorecards to With Worker or With Manager when you republish the plan. Workers can then set objectives for the next appraisal task.

**Note:** You cannot change the objective-setting deadline to a date that is after a *future* appraisal task.

For example, assume your published PMP is as follows:

Activity	Date
Objective-Setting Start Date	01 January 2007
Objective-Setting Deadline	31 January 2007

Activity	Date
Midyear Appraisal Task Start Date	15 June 2007
Midyear Appraisal Task End Date	30 June 2007
Full-Year Appraisal Task Start Date	15 December 2007
Full-Year Appraisal Task End Date	31 December 2007

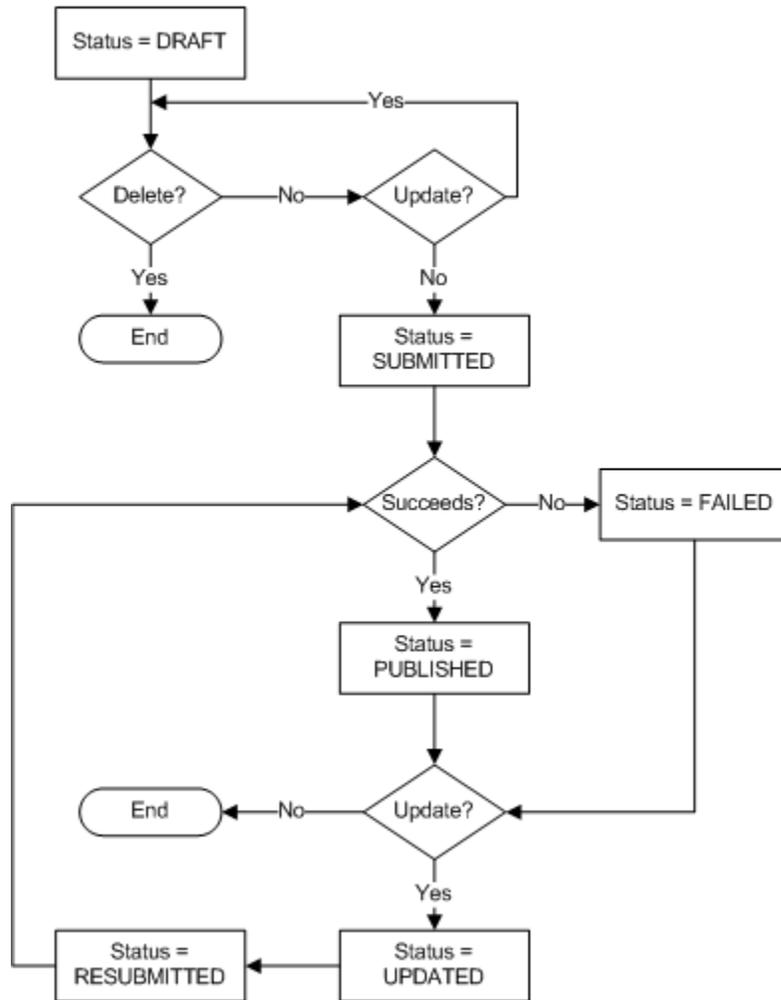
If you change the objective-setting deadline on 7th February, 2007 to 31 March, 2007, then, as the new deadline is still before the midyear appraisal (15 June through 30 June), HRMS assumes you are extending the objective-setting period for the midyear appraisal. If you also select Reset Scorecard Statuses, HRMS extends the objective-setting period for all plan members when you republish the plan. Otherwise, the new deadline applies only to workers who have not yet completed setting their objectives.

If you change the objective-setting deadline on 2 July, 2007 to 31 July, 2007, then, as the new deadline is after the completed midyear appraisal, HRMS assumes you are specifying a new objective-setting period for the next appraisal in this plan (the full-year appraisal). HRMS automatically resets scorecard statuses to With Worker or With Manager when you republish the plan so that all workers can set objectives for the next appraisal task.

## Status Values of Performance Management Plans

The following figure summarizes the Performance Management Plan's status values:

## Performance Management Plan Status Values



### Draft

When you create a PMP, its status is Draft. You can update a plan in draft status as often as necessary. You can also delete a draft plan.

### Submitted

When you first publish a draft plan, its status changes immediately to Submitted. A concurrent program performs the publication process, and the plan status remains Submitted until the program completes.

### Published

When the publication process completes successfully, the plan status changes to Published. At this point, the plan takes effect. You cannot delete a published plan.

## Failed

When the publication process is unsuccessful, the plan status is Failed. After updating the plan to correct any errors, you can submit it for publication again. However, you cannot delete a plan in Failed status.

## Updated

If you update a published or failed plan, its status changes to Updated. The status remains Updated until you publish the plan again.

## Resubmitted

When you publish an updated plan, its status changes to Resubmitted. When the republication process completes, the plan status changes to Published.

## Running the Mass Appraisal Creation for WPM Program

HRMS can automatically create appraisals for all members of a Performance Management Plan (PMP) on the date specified in the plan. Alternatively, you can run the appraisal-creation process independently of the PMP.

### To run the Mass Appraisal Creation for WPM program:

1. In the Name field, select Mass Appraisal Creation for WPM.  
The Parameters window opens.
2. In the Effective Date field, enter the date on which the application is to create appraisals.
3. In the Performance Plan field, select the plan for which you are creating appraisals.
4. In the Appraisal Template field, select the relevant appraisal template. If the plan includes only one combination of appraisal template and appraisal period, the appraisal template name appears here automatically.
5. In the Log Output field, select Yes to create a log file of the appraisal-creation process.

HRMS creates appraisals for all plan members and allocates them to the initiator identified in the PMP.

# Objectives

## The Objectives Library

The Objectives Library is a collection of reusable objectives that you create and maintain using the Objectives Library function. This function enables you to manage the enterprise objective-setting process efficiently. For example, you can:

- Define objectives consistently.
- Control the availability of objectives by specifying validity dates.
- Group objectives into locally defined categories for ease of retrieval.
- Establish naming standards for objectives.
- Allocate objectives automatically to eligible workers by means of the Performance Management Plan.

Managers and workers can search the library for objectives to include in personal scorecards.

## Creating and Updating Objectives

Using the Objectives Library function, you can create objectives to include in the library. You can identify objectives in the library for automatic allocation to eligible workers.

See: *Creating Objectives*, page 3-54

Some values that you define for objectives in the library, such as the target completion date and the weighting value, are default values only. Workers and managers can update such values when the objective appears in a worker's personal scorecard.

See: *Updating Objectives*, page 3-56

## Duplicating Objectives

You can make a copy of an objective already in the library to provide multiple versions of the same objective, perhaps with different validity dates or measures. However, for any objective in the library, the combination of name and validity dates must be unique. The application does not duplicate objective attachments.

## Deleting Objectives

You can delete an objective from the objectives library, even if HRMS has allocated the objective automatically to eligible workers. The deletion has no effect on the objective's

inclusion in existing personal scorecards.

## Importing Objectives

Instead of creating objectives individually, you can import them to the Objectives Library from a spreadsheet using Oracle Web ADI. This function enables you to import objectives definitions from other performance-management processes, for example. You can also update such objectives as a group (for example, you can set all validity dates at once) before uploading them to HRMS.

## Creating Objectives

HRMS supports the following ways of creating objectives:

- HR Professionals can define reusable objectives in the Objectives Library.
- Managers can define individual objectives for workers.
- Workers can define individual objectives for themselves.

## Creating Objectives in the Objectives Library

To create objectives in the Objectives Library, you use the Objectives Library function. When you define the objective, you can specify the following values:

Value	Description
Validity Dates	Outside these dates, you cannot allocate the objective to a worker. You can use these dates to tie an objective to a particular performance-management period (for example, a calendar year). You must specify validity dates if you intend to allocate the objective to workers automatically. If you specify no Valid To date, the objective is available until you delete it.
Next Review Date	You can trigger alerts using this date to remind workers and managers that an objective needs review. This date is a default value that you can change for individual workers.

<b>Value</b>	<b>Description</b>
Target Date	Workers must achieve the objective by this date. This date is a default value that you can change for individual workers.
Group	You can use this value to group objectives into types (for example, Communication, Management, and Team Leading). Users can search the Objectives Library for objectives in a particular group.
Priority	You can assign a relative priority to an objective (for example, low, medium, or high). Users can specify a priority value when searching the Objectives Library.
Include in Appraisals	If you select this value and HRMS creates appraisals automatically, the objective appears by default in the Objectives section of the appraisal of any worker who has the objective. You can update this selection for individual workers.
Weighting	The weighting value is an integer from a locally defined scale (for example, 1 through 5). It specifies the importance of this objective to the enterprise relative to other objectives. HRMS uses this value when calculating objective scores during appraisals. You can update this value for individual workers.

For information about the Measurement tab, see *Measuring Objectives*, page 3-57.

For information about the Eligibility tab, see *Allocating Objectives to Workers Automatically*, page 3-64

You can identify attachments for objectives. Note that, if you duplicate an objective, the application does not duplicate the objective's attachments.

## **Creating Individual Objectives**

If you are a manager, you create individual objectives for workers using the Cascade or Set Objectives task. If you are a worker, you create individual objectives for yourself using the Set Objectives task. Managers and workers can also create individual objectives in the Objectives section of the appraisal.

The definition of an individual objective is the same as the definition of an objective in the Objectives Library, except that an individual objective:

- Is for one worker only  
You cannot store individual objective definitions in the Objectives Library.
- Does not have validity dates  
Its validity is that of the personal scorecard to which you add the objective.
- Has the following tracking values:
  - Start Date  
This is the date from which the worker owns the objective.
  - Complete %  
The worker or manager enters a percentage-complete value to record progress.
  - Achievement Date  
When the Complete % value is 100, the worker or manager enters the achievement date.
  - Actual (for quantitative measures)  
The worker or manager completes this field for objectives with target values.
  - Verified (for qualitative measures)  
The manager selects this option to confirm that an objective is complete.

These values are disabled when you create the objective. They are enabled from the worker and manager View and Track Objective Progress tasks.

See Tracking Objectives, page 3-69

## Updating Objectives

You can update both individual objectives and objectives in the Objectives Library.

### Updating Objectives in the Objectives Library

You can update objectives in the Objectives Library at any time, regardless of whether the application has allocated them to workers automatically. Changes that you make to objectives in the Objectives Library do not affect objectives already copied to personal scorecards, as there is no link between the two versions of the objective.

For example, if you change the validity dates of an objective in the Objectives Library,

the validity dates of the same objective in existing personal scorecards are unaffected. Similarly, if you delete an objective from the Objectives Library or change its eligibility criteria, it remains in existing personal scorecards.

### Creating New Objectives in the Objectives Library

If you create a new objective with eligibility criteria in the Objectives Library after publishing your Performance Management Plan (PMP), the application allocates the objective automatically to eligible workers if you republish the PMP.

### Updating Individual Objectives

Individual objectives are outside the Objectives Library and apply to individual workers. During an objective-setting period, you can update these objectives freely. Outside objective-setting periods, you can update individual objectives only if permitted. (The HR Professional must select Allow Changes Outside This Period in the PMP to allow you to update objectives outside objective-setting periods.) In this case, objective-setting tasks in worker and manager task lists remain enabled outside objective-setting periods.

### Updating Tracking Information

Tracking information (such as % Complete and Achievement Date) is not part of an objective's definition. You can update tracking information throughout the performance-management period.

See: Tracking Objectives, page 3-69

## Measuring Objectives

When you define an objective, you can identify a measurement style. This value enables you to judge whether a worker has achieved an objective.

HRMS defines two measurement styles for objectives: quantitative and qualitative.

### Quantitative Measurement

You select a quantitative measurement style for objectives with outcomes that you can measure in numerical terms. For these objectives, you specify a target value, a unit of measure (UOM), and a type. These example objectives have quantitative measurement styles:

Objective	Target	UOM	Type
Increase sales revenue	10	Percent	MIN

Objective	Target	UOM	Type
Reduce department costs	10,000	U.S. Dollars	MAX
Sell and install complete kitchens	30	Number	MIN

## Qualitative Measurement

You select a qualitative measurement style for objectives with outcomes that you cannot assess in numerical terms. For example, objectives related to skill development or improvement of worker morale would require a qualitative measurement style. Achievement of this type of objective needs assessment and verification by a worker's manager, for example. For these objectives, managers can indicate, using the View and Track Objective Progress task, that they have verified achievement of the objective. These example objectives require a quantitative measurement style:

- Improve merchandise-display skills.
- Develop viable customer loyalty scheme.
- Manage successful merger of main and subsidiary procurement teams.

## Tracking and Assessment of Objectives

Having defined a measurement style for an objective and allocated the objective to a worker, you can track the worker's progress throughout the performance-management period. For example, if a retail manager's objective is to train team members in merchandise display and the target value is 100 percent, after three months the actual value may be 15 percent, after six months 25 percent, after nine months 40 percent, and after 12 months 70 percent. The worker's manager can review progress at any time and take remedial action, if appropriate.

See: Tracking Objectives, page 3-69

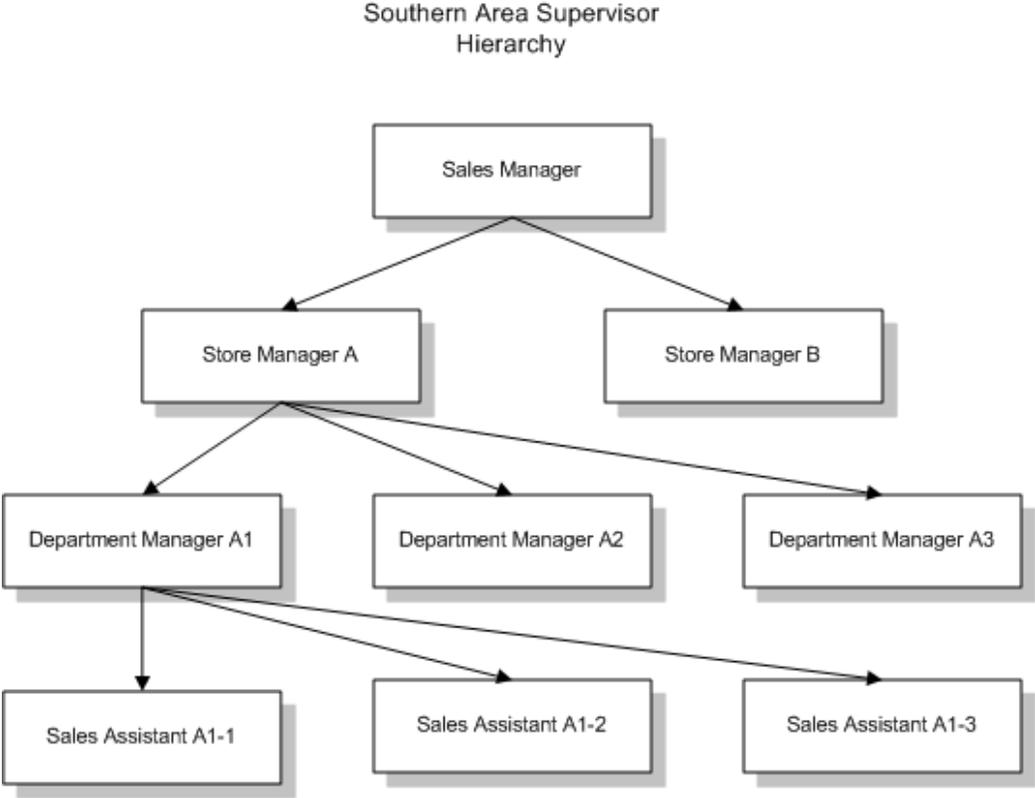
During a worker's appraisal, appraisers can assess a worker's *performance* in the delivery of his or her objectives. Assessment is a separate activity from tracking, and while failure to achieve objectives may also indicate poor performance, the relationship is not fixed.

See: Assessing Competencies and Objectives, page 3-115

## Cascading Objectives

The HR Professional identifies the population of a Performance Management Plan

(PMP) by selecting part or all of a hierarchy structure. For example, all workers in an organization hierarchy or all workers in two levels of a five-level supervisor hierarchy could be the members of a particular PMP. The following figure shows an example supervisor hierarchy whose workers belong to the PMP Southern Area Sales 2008.



To allocate the enterprise objectives in some form to all enterprise workers, you can use the cascading-objectives process. The top manager in the plan hierarchy (the sales manager, in our example), prompted by the PMP task Cascade or Set Objectives, begins the process by setting his or her *own* objectives using Employee Self-Service. Typically, the manager bases these objectives on the enterprise objectives. In this example, the sales manager has the following objectives:

Objective	Target	Unit of Measure	Type
Increase sales revenue	500,000	USD	Minimum
Develop customer awareness	N/A	N/A	N/A

To cascade these objectives to the store managers, the sales manager can:

- Allocate them to the store managers and adjust the targets, if appropriate. For example, the sales manager can allocate the objective to increase sales revenue to both store managers. For store manager A, the target is 275,000.00 USD, and for store manager B, the target is 300,000.00 USD.
- Create new objectives for either or both store managers. For example, to cascade the objective to develop customer awareness, the sales manager can create the new objective Conduct Customer Survey for store manager A and Devise Customer Loyalty Scheme for store manager B.

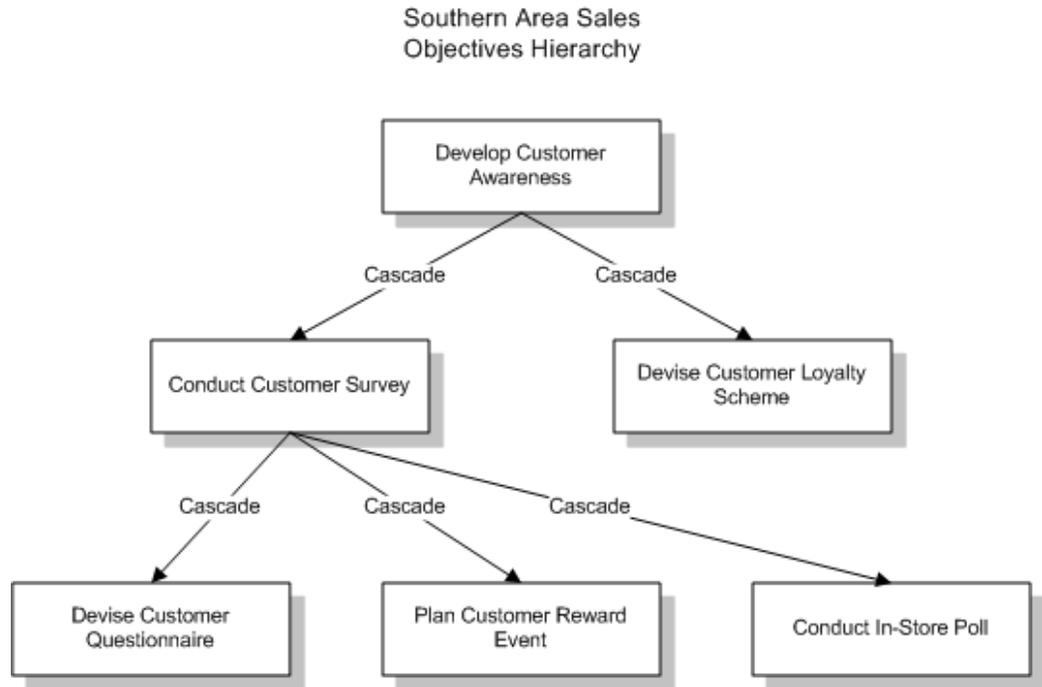
The store managers repeat this process for their department managers, who repeat it in turn for their sales assistants. For example, store manager A can cascade the objective Conduct Customer Survey to the three department managers by defining three new objectives:

1. Devise customer questionnaire.
2. Plan customer reward event.
3. Conduct in-store poll.

Once the store manager has set these supporting objectives for the department managers, they can, in turn, cascade their objectives to the sales assistants who report to them.

The effect of the cascading process is to define a hierarchy of objectives, where each level comprises supporting objectives for the objectives at the next level.

The following figure shows the objectives hierarchy from our example:



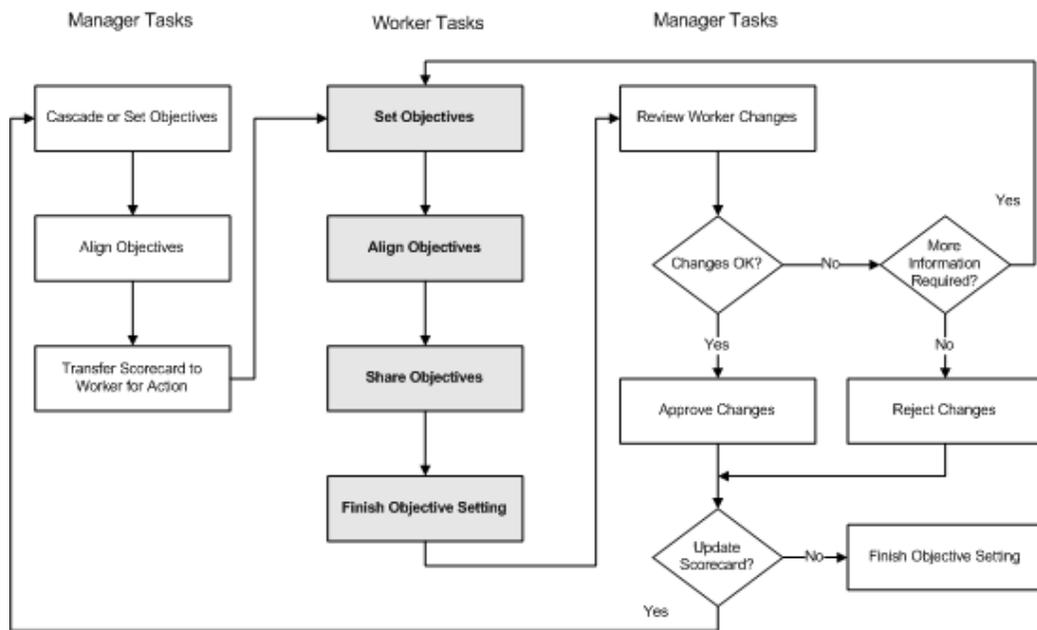
The supporting objectives are automatically aligned with the objectives above them in the hierarchy.

Note that, for each worker in the hierarchy, the cascading process is just one way of setting objectives. Managers can also set nonsupporting objectives for workers, and workers can set their own objectives. You can use all methods in a single PMP.

### **Task Flow in a Cascading Process**

In the PMP, the HR Professional can select either cascading or parallel objective setting. In a cascading process, managers start objective setting; in a parallel process, workers start objective setting.

The following figure summarizes the flow of control between managers and workers in a cascading process. The process starts with the manager task Cascade or Set Objectives.



Task Flow in the Cascading Process

For information about the tasks shown in this figure, see Manager Performance-Management Tasks, page 3-73 and Worker Performance-Management Tasks, page 3-77

For information about the parallel process, see Setting Objectives in Parallel, page 3-62

## Setting Objectives in Parallel

If the HR Professional selects the parallel objective-setting process in the Performance Management Plan (PMP), workers start the objective-setting process. By contrast, in the cascading process, managers start the objective-setting process.

When the application generates personal scorecards, they contain objectives automatically allocated to workers or copied from their previous appraisals or personal scorecards. In the parallel process, workers, prompted by the PMP task Set Objectives, update their personal scorecards before passing control of the scorecards to their

managers. The managers can then review their workers' personal scorecards before making any additional changes.

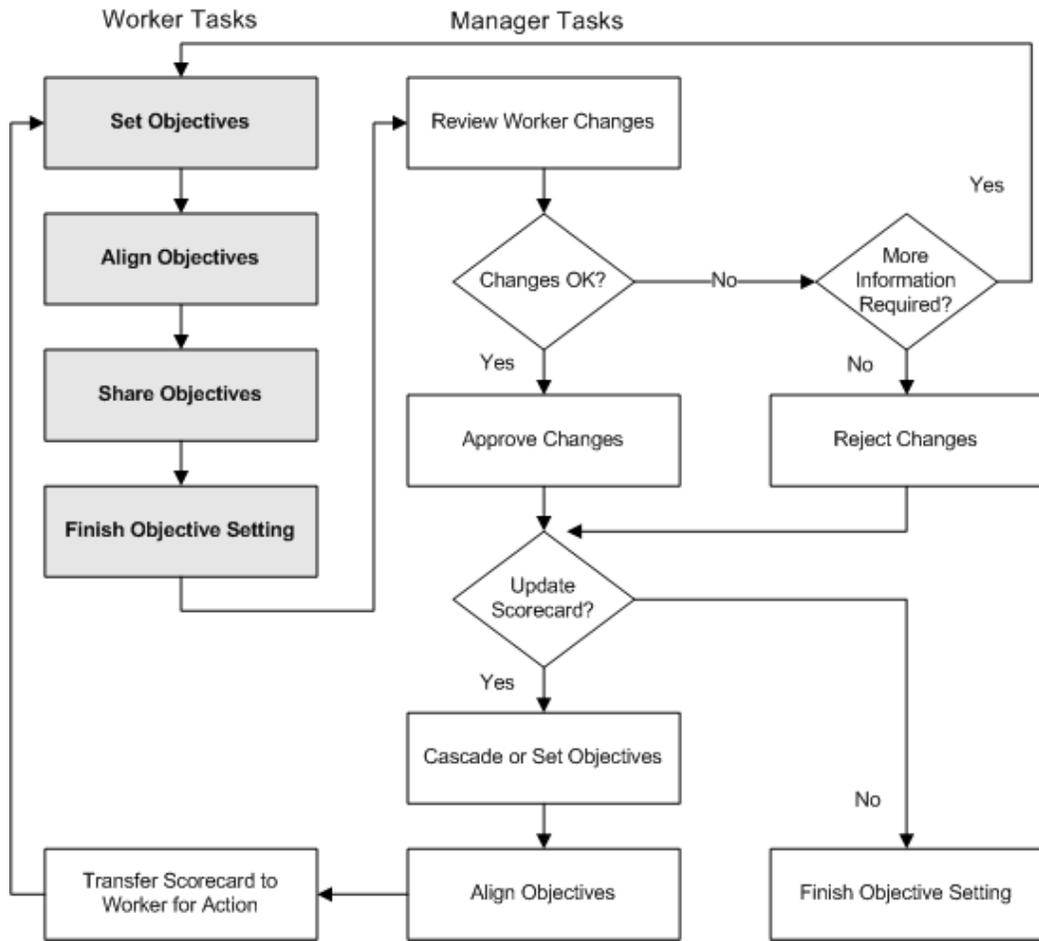
In enabling workers to drive the objective-setting process, the parallel method may be most useful to enterprises that use matrix management rather than traditional management hierarchies.

Although the flow of control between managers and workers varies with the process (cascading or parallel), the tasks that managers and workers can perform are the same. For example, even when using the parallel objective-setting process, managers can still cascade objectives to workers. Similarly, when using the cascading process, managers do not have to cascade objectives to their workers.

### **Task Flow in a Parallel Process**

The following figure summarizes the flow of control between managers and workers in a parallel objective-setting process. The process starts with the worker task Set Objectives.

Task Flow in the Parallel Process



For information about the tasks shown in this figure, see Manager Performance-Management Tasks, page 3-73 and Worker Performance-Management Tasks, page 3-77

For information about the cascading process, see Cascading Objectives, page 3-58

## Allocating Objectives to Workers Automatically

When you create an objective in the Objectives Library, you can specify who will receive the objective automatically by associating the objective with an eligibility profile. To create the eligibility profile, you use the Eligibility Profiles function.

When you publish a Performance Management Plan (PMP), members of the plan population automatically receive the objective in their personal scorecards if:

- They satisfy the objective's eligibility requirements.

- The objective's validity dates are the same as or wholly within the PMP dates.

## Creating New Objectives After Plan Publication

In some circumstances, HRMS can allocate objectives to eligible workers *after* you first publish a plan. That is, if you define an objective with eligibility criteria and the objective's dates are the same as or wholly within those of a published, ongoing plan, HRMS assesses the eligibility of the plan population for the new objective and automatically adds it to the personal scorecards of eligible workers if you republish the plan.

## Allocating a Single Objective to Workers in Multiple Business Groups

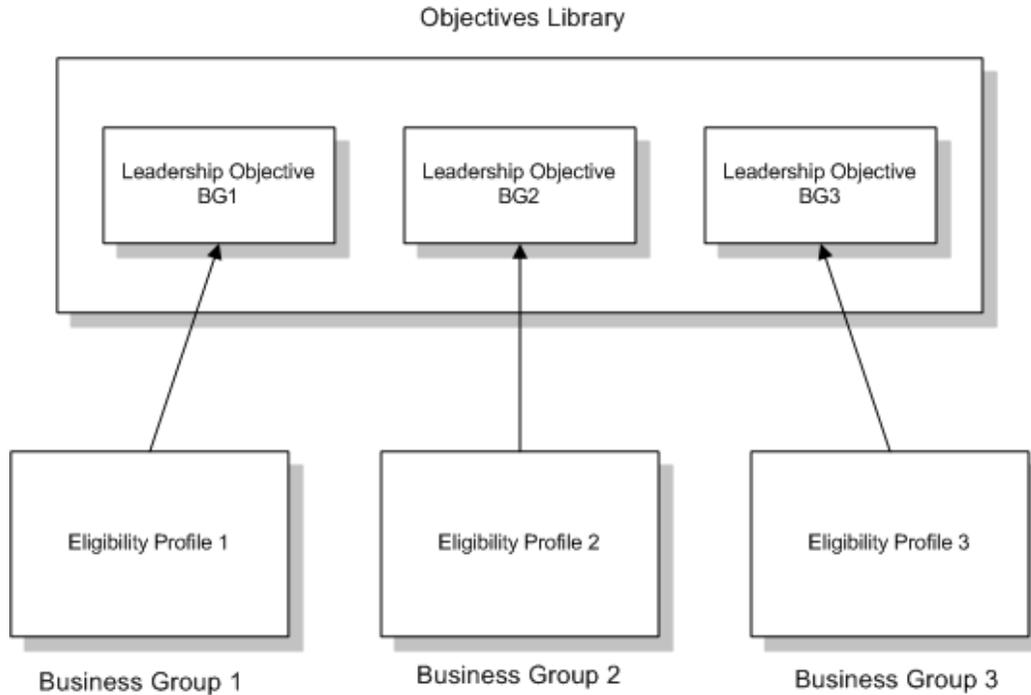
If you have access to the Objectives Library function, you can:

- View *all* objectives in the Objectives Library.
- Use any existing eligibility profile, regardless of business group, in an objective definition in the Objectives Library.

As eligibility profiles are business-group specific, an eligibility profile you define in one business group is unavailable for use in other enterprise business groups. Therefore, when you associate an objective with an eligibility profile, you effectively restrict automatic allocation of that objective to a single business group.

To allocate an objective automatically to workers in multiple business groups, you create a version of the objective for each business group by duplicating the objective in the Objectives Library. In each version of the objective, identify an appropriate eligibility profile. Remember also to ensure that each combination of objective name and validity dates is unique in the Objectives Library. As you can see all objectives in the Objectives Library and all enterprise eligibility profiles, you can perform this task without switching responsibilities.

The following figure shows the relationship between business-group-specific eligibility profiles and objectives in the Objectives Library.



### An Automatic-Allocation Example

Automatic allocation results for this objective appear in the following table:

- The objective name is Attend Retail Management Seminar Level 3.
- The objective validity dates are 01/01/2007 to 12/31/2007.
- Workers whose job title is department manager are eligible for this objective.

<b>Employee</b>	<b>Job</b>	<b>PMP</b>	<b>Plan Start</b>	<b>Plan End</b>	<b>Receives Objective?</b>
A	Department Manager	Performance Plan 2007	01/01/2007	12/31/2007	Yes
B	Supervisor	Performance Plan 2007	01/01/2007	12/31/2007	No
C	Department Manager	Objectives Plan 2006 - 2008	09/01/2006	03/31/2008	Yes

Employee	Job	PMP	Plan Start	Plan End	Receives Objective?
D	Department Manager	Objectives Plan 2006 - 2007	06/01/2006	05/31/2007	No

- Employee A receives this objective automatically because he is a department manager and the objective's validity dates are the same as those of the PMP to which he belongs.
- Employee B does not receive this objective because, even though she belongs to the same PMP as Employee A, she is not a department manager and therefore fails to meet the eligibility criteria.
- Employee C receives this objective automatically because he is a department manager and the objective's validity dates are wholly within those of the PMP to which he belongs.
- Employee D does not receive this objective because, although she is a department manager, the objective's validity dates are outside those of the PMP to which she belongs.

## Sharing and Aligning Objectives

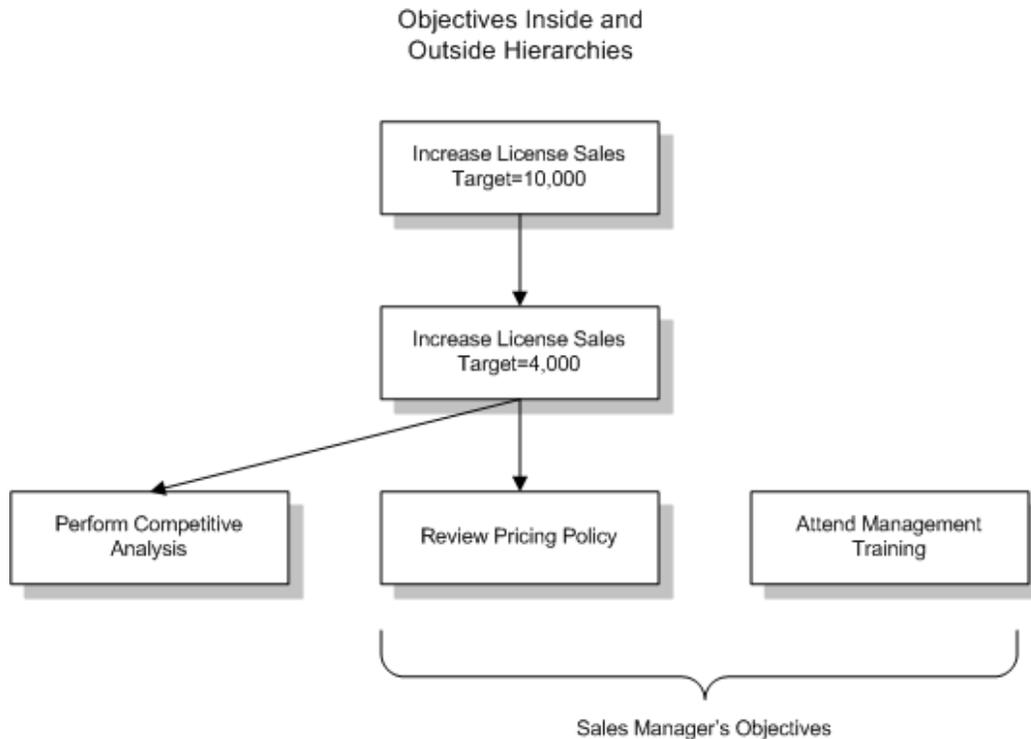
You can build hierarchies of objectives, with objectives at lower levels in the hierarchies supporting those immediately above them. Objectives at lower levels, known as *supporting objectives*, are said to be *aligned* with those objectives that they support.

Supporting objectives:

- Can be identical to the objectives that they support, perhaps with different targets, or they can be completely different
- Do not have to have the same measurement style as the objectives that they support

Not all objectives need to belong to an objectives hierarchy. Typically, personal objectives remain outside hierarchies. You can delete objectives that belong to objectives hierarchies without causing errors.

The following figure shows objectives inside and outside a hierarchy:



In this figure, the objectives at the first two levels of the hierarchy are identical; at the third level, objectives are different from the objective that they support. The sales manager has two objectives, but only one, Review Pricing Policy, aligned with Increase License Sales, belongs to an objectives hierarchy. The sales manager is unaware of the objective Perform Competitive Analysis.

## Ways of Constructing an Objectives Hierarchy

When managers cascade objectives to workers who report to them, they create supporting objectives that are automatically aligned with the cascaded objective. Workers and managers can also create relationships between objectives manually. Before you can align an objective with a different objective:

- The HR Professional or manager must have enabled sharing and alignment in the Performance Management Plan (PMP).
- The objective's owner must have *shared* the objective with you and permitted alignment.

## Sharing Your Objectives

You can share any of your objectives with other members of the PMP. If you allow others to view an objective, they can view its detail but not align their objectives with it.

If you allow others both to view and to align, they can define supporting objectives for the shared objective.

For example, if you share the objective Improve Supplier Relationships with four coworkers, each coworker can define a supporting objective and align it with your objective. You can view those supporting objectives only if security permissions give you access to your coworkers' personal scorecards.

Managers typically share objectives by cascading them, in which case sharing and alignment are automatic. Alternatively, managers can share objectives if they use Employee Self Service to perform the Share Objectives task.

## Aligning Your Objectives

When you align an objective, you define a relationship between your objective and an objective that another member of the PMP has shared with you. The Align Objectives page, accessed from the Align Objectives task, displays a list of people who have shared objectives with you; you can view details of each shared objective. Note that you can align an objective with only one other objective.

## Aligning Worker Objectives

When sharing and alignment are enabled, managers receive the Align Objectives task. This optional task enables you to align the objectives of workers who report to you with your own objectives. In the Alignment column, you can align each objective in a worker's personal scorecard with one of your own objectives. As you own these objectives, you do not have to share them with the worker first. You may want to perform Align Worker Objectives when workers have initiated the objective-setting process and have no access to shared objectives.

## Tracking Objectives

When the HR Professional publishes a Performance Management Plan (PMP), managers and workers who belong to the plan each receive the View and Track Objective Progress task. The task appears in the Talent Management Task List at the start of the performance-management period and is enabled throughout.

## Recording Progress

Workers can complete the following fields for each objective:

- Complete (%)
- Achievement Date

This field applies to 100 percent complete objectives only.

- Actual

This field applies to objectives with quantitative measurement styles (those with target values) only.

Managers can view a worker's reported progress using View and Track Objective Progress from the Talent Management Task List. They can also:

- Update a worker's progress.
- For objectives with the qualitative measurement style and against which the worker has recorded an achievement date, select the Verified option. This option indicates that the manager has confirmed that the objective is complete.

See: Measuring Objectives, page 3-57

Workers and managers can update progress as often as required throughout the performance-management period. Enterprises can require workers to update progress at regular intervals (for example, monthly) to maintain focus on objectives.

If the application creates appraisals automatically from the PMP, achievement dates recorded during the objective-tracking process appear automatically in the Objectives section of the appraisal.

## Personal Scorecards

A personal scorecard comprises the objectives of a single worker associated with a single Performance Management Plan (PMP). Workers who belong to more than one PMP have multiple personal scorecards. Also, a worker can have more than one personal scorecard from a single PMP if the worker has multiple assignments and the plan does not apply to primary assignments only.

The application generates a worker's personal scorecard when the HR Professional first publishes the PMP. At that time, the scorecard status is either Not Started: With Manager or Not Started: With Worker, depending on the objective-setting method. In a cascading objective-setting process, managers start the updating process; in a parallel objective-setting process, workers start the objective-setting process.

See: Cascading Objectives, page 3-58 and Setting Objectives in Parallel , page 3-62

## Populating Personal Scorecards

When the application generates a personal scorecard, it can include:

- Objectives from the Objectives Library for which workers are eligible  
See: Allocating Objectives to Workers Automatically, page 3-64
- Incomplete objectives from a previous personal scorecard

During an objective-setting period, both managers and workers can update workers' personal scorecards.

Ways of populating a personal scorecard during an objective-setting period include:

- Creating new, individual objectives
- Copying objectives from previous scorecards
- Copying shared objectives
- Copying objectives from the Objectives Library
- Duplicating objectives already in the scorecard
- Cascading objectives from managers to workers

You can also update and delete objectives in the personal scorecard. An objective's Created By field indicates who created the objective. The value Eligibility Criteria means that the application allocated the objective to you automatically.

The objective-setting process itself is task driven. Personal scorecards can transfer between managers and workers as often as necessary during an objective-setting period. At the end of an objective-setting period, managers publish the personal scorecards of workers who report directly to them.

See: Manager Performance-Management Tasks, page 3-73 and Worker Performance-Management Tasks, page 3-77

## **Monitoring Scorecard Status**

The HR Professional can monitor personal scorecards from creation to publication using the Performance Management Plans function. The Scorecard Summary for a plan shows the number of scorecards in each status. For example, the summary shows the number of personal scorecards that are With Worker and the number that are Published.

## **Viewing and Tracking Personal Scorecards**

Throughout the performance-management period, workers and managers perform the View and Track Objective Progress task to view personal scorecards and record progress against individual objectives.

See: Tracking Objectives, page 3-69

## **Personal Scorecards After an Objective-Setting Period**

After the end of an objective-setting period, you cannot alter the contents of the scorecard by updating, deleting, or adding objectives unless:

- The HR Professional alters the dates of the objective-setting period and republishes

the PMP.

In this case, the application may reset the scorecard status to enable you to resume objective setting.

- The HR Professional has explicitly enabled you, in the PMP, to make changes outside the objective-setting period. In this case, the end date of the objective-setting period is a proposed deadline only.

If the HR Professional creates a new objective in the Objectives Library for which you are eligible, the application adds that objective automatically to your personal scorecard if the HR Professional republishes the PMP.

See: Updating Objectives, page 3-56

## Personal Scorecards in the Appraisal

Personal scorecards appear automatically in the Objectives sections of appraisals if:

- The application generates appraisals automatically.
- The appraisal template identified in the PMP includes an objective-assessment template.

Objectives appear in the Objectives section only if the Appraise option in the objective definition is selected; any objective for which Appraise is deselected does not appear.

During the appraisal, workers and managers can add, update, and delete objectives in the Objectives section of the appraisal.

**Note:** If the application does not create appraisals automatically, there is no automatic connection between the personal scorecard and the appraisal. In this case, you can transfer your objectives manually to the Objectives section of the appraisal, if appropriate.

## Personal Scorecards After Appraisals

The application automatically updates personal scorecards to match the Objectives sections of completed appraisals. For example, if you include an additional objective in the Objectives section during the appraisal, then the application copies the new objective to your personal scorecard when the appraisal is complete. You can record tracking information for this new objective after the appraisal, and the objective appears in the Objectives section of subsequent appraisals during this performance-management period. At the end of this period, the application can copy incomplete objectives to future personal scorecards.

See: Performance Management Plans, page 3-43

# Workforce Performance Management Task Lists

## Manager Performance-Management Tasks

Your Talent Management Task List includes an entry for each Performance Management Plan (PMP) to which you belong. Under each PMP entry appears a list of tasks that the application generates when the HR Professional publishes the PMP. The application enables these tasks at appropriate times during the performance-management period.

The tasks that you see and the order in which you perform them depend on configuration choices made in the PMP. For example, if the PMP includes appraisal creation, the application generates the Manage Appraisals task and allocates it to you. Otherwise, the task does not appear. Similarly, if the PMP uses the parallel objective-setting process, your first task is likely to be Review Worker Changes (as the worker starts the objective-setting process). If the PMP uses the cascading objective-setting process, your first task is likely to be Cascade or Set Objectives (as *you* start the objective-setting process).

This topic describes the manager performance-management tasks, the associated notification messages, and the Switch Manager function. The first five tasks described (Cascade or Set Objectives, Align Objectives, Transfer Scorecards to Workers for Action, Review Worker Changes, and Finish Objective Setting) are the objective-setting tasks and are enabled during objective-setting periods. (They are enabled outside objective-setting periods only if the HR Professional has explicitly allowed you, in the PMP, to make changes outside the objective-setting period.)

### Cascade or Set Objectives

The Cascade or Set Objectives task enables you to set objectives for workers who report to you directly. You can:

- Add one or more objectives to each worker's personal scorecard by creating new objectives, copying objectives (from the Objectives Library, from the worker's previous scorecards, or from objectives shared with the worker), or duplicating objectives already in the personal scorecard.
- Cascade one or more of your own objectives to some or all of your team members. If you use this approach, you must first use Employee Self-Service to set your own objectives.

See: Cascading Objectives, page 3-58

**Note:** Your manager must have approved objectives that you set for yourself before you can cascade those objectives to your team

members.

You can use either or both of these approaches to update a single personal scorecard. Note also that you do not have to set objectives for workers, even though this task appears in your task list. A worker's personal scorecard may already include objectives that the application allocated automatically or copied from the previous personal scorecard or appraisal. You can simply transfer the scorecard to the worker without making further changes, if appropriate. You can also update or delete objectives already in a worker's personal scorecard.

You can perform this task only when the scorecard status is Not Yet Started: With Manager or With Manager. Changes that you make to personal scorecards are not visible to their owners until you perform the Transfer Scorecards to Workers for Action task.

## **Align Objectives**

The Align Objectives task enables you to define relationships between your workers' objectives and your own objectives. You may want to perform this task if you have already shared some of your objectives (using Employee Self-Service) with one or more of your team members and added supporting objectives to those workers' personal scorecards.

See: Sharing and Aligning Objectives, page 3-67

This task appears in your task list only if the plan administrator enables sharing and alignment in the PMP. You do not have to perform this task, even though it appears in your task list. Not all objectives must be aligned with other objectives. Also, this task is not relevant for objectives that you have allocated using the cascading process, as these objectives are automatically aligned with the objectives that you cascade.

## **Transfer Scorecards to Workers for Action**

When you have finished updating a worker's personal scorecard, you perform this task to transfer the scorecard to its owner. In the notification message, you can specify changes that the worker can make to the scorecard. When you perform this task, the scorecard status changes to With Worker.

You must perform this task if you have updated the worker's personal scorecard. You cannot perform the Finish Objective Setting task (which publishes the scorecard) if you have not first transferred the updated scorecard to its owner.

## **Review Worker Changes**

You perform the Review Worker Changes task as workers return their reviewed or updated personal scorecards to you for approval. This task lists all personal scorecards

with changes that you have not yet reviewed and with a status of Approval Requested. You can:

- Approve all changes to the scorecard. The scorecard status changes to With Manager, and you can make further changes to the scorecard, if necessary.
- Request further action. In this case, the application returns the personal scorecard to the worker. In the notification message, you can specify any changes that you want the worker to make. The application changes the scorecard status to With Worker. When the scorecard status changes back to Approval Requested, you can review the scorecard again.
- Reject all changes to the scorecard. In this case, the application removes *all* changes that the worker has made to the scorecard. If that is not the desired effect, select the Request Further Action option. When you reject the worker's changes, the scorecard status changes to With Manager, and you can make further changes to the scorecard, if necessary.

**Note:** To publish the worker's scorecard, you must perform the Finish Objective Setting task. When you click Approve and Finish, the application takes you directly to that task.

## Finish Objective Setting

You perform this task once for each worker when you have finished the objective-setting and review processes. You can perform this task only if the scorecard status is With Manager. You cannot perform this task (the task is disabled) if the scorecard contains changes that you have not transferred to the worker using the Transfer Scorecards to Workers for Action task. When you perform the Finish Objective Setting task, the scorecard status changes to Published.

**Note:** If you do not perform this task and appraisals are included in the PMP, any changes that you make to scorecards during the objective-setting process are lost when the application generates appraisals for the first appraisal period.

## View and Track Objective Progress

This task is enabled throughout the performance-management period. All personal scorecards, regardless of their statuses, are accessible from this task. You can:

- View a worker's personal scorecard by clicking the Details icon. If the worker is recording progress against objectives, you can view that information here.
- Update a worker's progress by clicking the Action icon. You can update any of the

tracking fields (% Complete, Achievement Date, Actual, and Verified) for an objective.

**Note:** You select Verified when you have confirmed that the worker has achieved an objective whose measurement style is qualitative.

See: Measuring Objectives, page 3-57 and Tracking Objectives, page 3-69

## Manage Appraisals

The Manage Appraisals task appears in your task list only if the PMP includes appraisals. It occurs once for each appraisal task (each combination of appraisal template and appraisal period) identified in the PMP. For example, if the PMP identifies a midyear appraisal and a full-year appraisal, two Manage Appraisals tasks appear in the task list for that PMP.

The application enables this task on the appraisal-task start date specified in the PMP and disables it on the plan-end date.

**Note:** If you do not perform the Finish Objective Setting task before the appraisal-generation date specified in the PMP, the application discards all changes made to personal scorecards during the objective-setting period before changing the scorecard status to Published.

While this task is enabled, the application disables the objective-setting tasks. To manage objectives during an appraisal-task period, you use the Objectives section of the appraisal.

When you select this task, your Appraisals home page lists appraisals for PMP members for whom you are main appraiser. If the PMP identifies you as the appraisal initiator, you have ownership of the appraisal. If the appraisee is the initiator, you cannot update the appraisal until the appraisee first shares it with you.

See: The Appraisal Process, page 3-92

## Notification Messages

You receive notification messages when:

- The application generates your task list, if the plan administrator selects Notify Plan Population.
- Workers transfer their personal scorecards to you for approval.

You issue notification messages when:

- You transfer personal scorecards to workers.

- You publish workers' personal scorecards.

## Using the Switch Manager Function

You can access only PMPs to which you belong. If a worker who reports to you belongs to a PMP of which you are not a member, you can use the Switch Manager function to access that worker's personal scorecard. Your security profile must give you access to the target manager.

Note that the Switch Manager function is enabled by default, but may be disabled in your enterprise.

## Worker Performance-Management Tasks

Your Talent Management Task List includes an entry for each Performance Management Plan (PMP) to which you belong. Under each PMP entry appears a list of tasks that the application generates automatically. The tasks are those appropriate to the PMP and can vary from one PMP to another. The application enables these tasks at appropriate times during the performance-management period. For example, you can perform the appraisal-management task during the appraisal-task period only.

If you have multiple personal scorecards for the same PMP (because you have multiple assignments), use the Switch Assignment task in the task list to display the task list for each assignment. You may report to a different manager or supervisor in each assignment.

This topic describes all worker performance-management tasks and their associated notification messages.

## Set Objectives

The Set Objectives task enables you to update your personal scorecard of objectives. This task is usually enabled during the objective-setting period only. The dates of this period appear in the task's Start Date and End Date columns in the Talent Management Task List. The scorecard status must be either With Worker or Not Started: With Worker.

- The scorecard status is With Worker if your manager started the objective-setting process and has transferred your personal scorecard to you. You receive a notification message that may include your manager's instructions for updating the scorecard.
- The scorecard status is Not Started: With Worker if you are starting the objective-setting process. The scorecard may already contain some objectives that the application allocated to you automatically or copied from a previous appraisal or personal scorecard.

You can update your personal scorecard by:

- Creating new objectives
- Copying objectives from the Objectives Library, from your previous scorecards, or from shared objectives (objectives that others have shared with you)
- Duplicating objectives already in the scorecard and updating them (for example, to change the objective name)
- Updating objectives already in the scorecard

You can also review any objectives that others (typically your manager) have shared with you. Having access to shared objectives enables you to define supporting objectives. For example, if your manager shares the Increase Sales of Electrical Goods objective, you can define an objective that will contribute to the shared objective (but does not have to be identical to it). For example, your objective could be Redesign Sales Area for Electrical Goods. You make the relationship between the two objectives explicit when you perform the Align Objectives task.

## Align Objectives

The Align Objectives task enables you to define relationships between any of your objectives and objectives that others (such as your manager) have shared with you. For each supporting objective in your personal scorecard, you select the shared objective that it supports in the Aligned To column. If you have defined no supporting objectives, you do not need to perform this task.

If it appears, this task is usually enabled during the objective-setting period only. This task does not appear if sharing and alignment are not required activities.

## Share Objectives

The Share Objectives task enables you to give other members of the PMP access to your objectives. You can allow others to:

- View an objective.
- View an objective and align their objectives with it.

Enterprise policy determines whether you must perform this task and for which objectives. For example, if you are a manager, you can use Employee Self-Service to share objectives with your team as an alternative to the cascading process. If matrix-management structures are in place, you may need to share objectives with particular coworkers.

If it appears, this task is usually enabled during the objective-setting period only. This task does not appear if sharing and alignment are not required activities.

## Finish Objective Setting

When you have finished updating your personal scorecard, you perform the Finish Objective Setting task to transfer the scorecard to your manager for approval. In the notification message, you can explain any changes that you have made. The scorecard status changes to *With Manager*, and you can make no further changes unless your manager returns the scorecard to you. If this happens, you receive a notification message from your manager.

This task is usually enabled during the objective-setting period only.

## View and Track Objective Progress

The View and Track Objective Progress task enables you to view your personal scorecard and record progress against your objectives. For incomplete objectives, you can update the % Complete, Achievement Date, and Actual values. (You can enter an achievement date only for objectives that are 100 percent complete.) Your manager can review values that you enter here.

## Manage Appraisals

The Manage Appraisals task enables you to review and update your own appraisal and is enabled from the start of the appraisal-task period to the plan-end date. The dates of the appraisal-task period appear in the task's Start Date and End Date columns in your Talent Management Task List. While this task is enabled, all objective-setting tasks are disabled. (During appraisal activity, you can update your objectives in the appraisal rather than in your personal scorecard.) If multiple appraisals (for example, midyear and full-year appraisals) occur during a single performance-management period, this task appears once in your Talent Management Task List for each appraisal.

If you are the appraisal initiator, you see the appraisal on your Appraisals home page with the status of *Planned* at the start of the appraisal-task period. If your manager is the appraisal initiator, you receive a notification message when your manager shares the appraisal with you.

## Performance-Management Notification Messages

You receive performance-management notification messages when:

- Your manager transfers your personal scorecard to you.
- Another member of the PMP shares an objective with you.

You may also receive a notification message when the application generates your task list.

You issue notification messages when:

- You transfer your personal scorecard to your manager.
- You share your objectives with other members of the PMP.

In some cases, you can enter your own text in a message; in others, the application generates the message automatically using standard notification text.

# Qualifications

## Qualification Types

Oracle HRMS enables you to record the types of qualifications recognized by your enterprise, including:

- Educational and vocational qualifications
- Licenses
- Awards
- Honors

You can rank qualifications. For example, you could rank a doctorate as 1, a master's degree as 2, a bachelor's degree as 3, and so on. You can rank equivalent qualifications at the same level. For example, you could rank both a bachelor's degree and a vocational qualification as level 3. This feature is useful for identifying all workers qualified at level 3 or above, for example.

## Qualifications Framework Qualifications

*Qualifications Framework qualifications* result from the achievement of unit standard competencies. For this type of qualification, you record national Qualifications Framework details, including the number of credits attached to the qualification, the awarding body, and the field of learning to which the qualification belongs.

## Schools and Colleges

You can identify the schools and colleges that deliver the qualifications that your enterprise recognizes so that you can record where a worker gained a qualification. As schools and colleges are available to all business groups, you have to define them once only.

## Defining Qualification Types

Use the Qualification Types window to define the qualifications that your enterprise recognizes.

Before you start this task, your system administrator must define generic qualification types (such as Degree, Diploma, and License) in the PER\_CATEGORIES lookup.

### To define qualification types:

1. Enter the name of the qualification.
2. In the Category field, select the qualification type.
3. If required, rank the qualification.

### Entering Qualifications Framework Details

**Note:** This section applies only if you are defining a Qualifications Framework qualification.

4. Enter the Qualifications Framework identifier for the qualification.
5. Select the Qualifications Framework qualification type (for example, Diploma, Bachelor of Arts, or School Certificate).
6. Select the main and subsidiary fields of learning to which the qualification belongs.  

The main field of learning identifies the industry or sector to which the qualification belongs (for example, Management Studies or Nursing).

The subsidiary field identifies the subject area within the field of learning to which the qualification belongs (for example, Marketing or Neonatal Care).
7. Select the level type and level.  

Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a qualification could be at Level 3 on a scale ranging from Level 1 through Level 5.

The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).
8. Select the credit type and enter the total number of credits for this qualification.  

The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a Qualifications Framework qualification.
9. Select the qualification provider.
10. Select the Quality Assurance (QA) organization that registered the qualification provider.

## Entering Qualification Competencies

**Note:** This section applies only if you are defining a Qualifications Framework qualification.

11. Click Competencies to open the Qualification Competencies window.
12. In the Unit Standard Competency Links region, select the name of a unit standard competency that contributes to this qualification.  
The Unit Standard ID appears automatically.
13. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
14. Enter the dates between which the link is valid. You must enter a start date, but you can leave the end date blank.
15. Repeat Steps 12 through 14 for additional unit standard competencies.
16. Save your work.

## Entering Qualifications

You can enter your workers' completed and in-progress qualifications when they first join the enterprise. You may need to update a worker's qualifications record after completion of a training course, for example.

**Note:** If the worker for whom you are entering qualifications has qualifications records in other business groups, then you will be able to see, but not update, qualifications entered for the worker in those other business groups.

Workers and managers can use these SSHR functions to enter and update worker qualification records:

- Education and Qualifications
- Other Professional Qualifications

In the forms-based interface, use the Qualifications window, accessed from the People window, to enter and update qualifications.

### To enter qualifications:

1. Select the qualification type, and enter its title.

For information about defining qualification types, see: Defining Qualification Types, page 3-81

2. Select the qualification status, for example, ongoing or completed.
3. Enter the grade at which the worker holds the qualification, if appropriate.
4. Select the establishment at which the worker gained the qualification. The list comprises establishments you recorded the worker as having attended.  
See: Entering Schools and Colleges Attended, page 3-86
5. Enter the name of the body that awards the qualification. If you record this value in the qualification types record for a Qualifications Framework qualification, it appears here automatically.
6. Enter the dates between which the worker studied for the qualification. Leave the end date blank if the qualification is in progress.
7. Enter the worker's ranking in the study group, if relevant.
8. Save your work.

**To enter license details:**

1. Click the License tab.
2. Enter the license number, for example, a driver's license number.
3. Enter any restrictions on the license. For example, the license may not be valid in certain states.
4. Enter the license expiry date.

**To enter tuition fees:**

1. Click the Tuition tab.
2. Enter the fee amount, and select the currency.
3. Select the tuition method, for example, day release.
4. Specify how the worker's tuition fees will be reimbursed (for example, bank transfer when the qualification is awarded).

**To enter training details:**

1. Click the Training tab.
2. Enter the amount of training completed. For example, enter 30 days completed of a training program that lasts 60 days.
3. Enter the total amount of training required to deliver the qualification (for example, 60 days).
4. Enter the units in which the training is measured, for example, days.

**To enter professional membership details:**

1. Click the Professional Membership tab.
2. Select the professional body to which the person belongs. The list comprises organizations with the classification Professional Body.
3. Enter the worker's membership number and category.  

The available membership categories depend on the table used to calculate subscription rates for the professional body. Oracle Payroll uses this table when calculating the amount to deduct from a worker's salary during the payroll run.
4. Select the method by which the subscription is to be paid. This is optional and for information only.

**To view Qualifications Framework details:**

**Note:** This section applies to Qualifications Framework qualifications only.

1. Click the Qualifications Framework Details tab.
2. Details of the selected qualification appear. For example, you can see its ID, the field of learning to which it belongs, and the number of credits earned. You cannot update this information.

**To enter subject details:**

1. Save your work.
2. Select the first subject the qualification comprises.
3. Select the subject status, for example, passed or ongoing.

4. Enter the dates between which the subject is studied. You must enter a start date, but you can leave the end date blank.
5. If the subject forms a major part of the qualification, select Major.
6. Optionally, enter the grade at which the worker studies the subject.
7. Enter further subjects, as appropriate.
8. Save your work.

## Defining Schools and Colleges

Use the Schools and Colleges window to define the establishments that deliver the qualifications that your enterprise recognizes.

### To create establishments:

1. Enter the establishment name.
2. Enter the location name.
3. Repeat Steps 1 and 2 for additional establishments or locations.
4. Save your work.

These establishments appear in the list of schools and colleges in the Schools and Colleges Attended window.

## Entering Schools and Colleges Attended

Use the Schools and Colleges Attended window, accessed from the People window, to enter a worker's attendance at educational establishments.

**Note:** If a worker has person records in other business groups, then you can see, but not update, any establishment information entered for the worker in those other business groups.

### To enter schools and colleges attended:

1. Select the name of the school or college attended.

If the school or college does not appear in the list of values, then you can enter the information in the name field.

**Note:** If you enter the name of the school or college, then it is available for this worker only. To update the global list of schools and colleges that is available to all workers, see: Defining Schools and Colleges, page 3-86

2. Enter the attendance dates, and indicate whether the worker's attendance was full time. If the attendance is ongoing, then leave the end date blank.
3. Repeat Steps 1 and 2 for additional establishments.
4. Save your work.

In a worker's qualifications record, you select the establishment at which the worker gained a qualification from the list of schools and colleges the worker attended.

# Appraisals

## Appraisals Overview

The appraisal process is a key component of the talent management function. During a typical appraisal, you assess a worker's competencies and objectives and identify development opportunities for the next appraisal period. The appraisal provides a snapshot of the worker's achievements and supplies input to related processes, such as training and compensation planning.

Most enterprises conduct appraisals at regular intervals (for example, yearly), primarily to assess competencies and objectives and influence compensation plans. However, you can also use appraisals for other purposes. For example, you can:

- Take a snapshot of worker competencies at the start or end of a project.
- Evaluate worker competencies after an event, such as a retraining exercise, to test its effectiveness.
- Assess worker progress against objectives at intervals during the appraisal period.
- Gather exit information when a worker leaves the enterprise.
- Assess specific competencies for a position or project.

The Oracle HRMS appraisals function can support all such requirements.

## A Collaborative Approach to the Appraisal

In a traditional appraisal, the appraisee's ability to contribute to the appraisal is limited. The manager or appraiser completes most of the appraisal and may invite the appraisee to comment at the end of the process.

HRMS challenges the traditional approach by making the appraisal the product of collaboration between the main appraiser and the appraisee. The main appraiser *shares* the appraisal with the appraisee to allow the appraisee to view or update the appraisal. If the main appraiser also transfers ownership of the appraisal to the appraisee (which is optional unless the appraisee is to update the appraisal) the appraisee *shares* the appraisal with the main appraiser to return ownership. This sharing of the appraisal between main appraiser and appraisee can occur as often as necessary during a single appraisal process.

See: The Appraisal Process, page 3-92

## Appraisal Participants

Appraisals can involve the following types of participants:

- The main appraiser, usually the appraisee's manager, who controls the appraisal process.
- Appraisers, who can contribute to all sections of the appraisal.
- Reviewers, who can view others' evaluations and enter overall comments. They cannot update other sections of the appraisal.
- Other participants, who contribute to 360-degree appraisals only. They complete questionnaires about the appraisee's performance, for example, and can enter overall comments, but can neither view nor update the rest of an appraisal. Other participants are typically peers or subordinates of the appraisee to whom you do not want to reveal the appraisal contents.
- The appraisee, the subject of the appraisal, who can view or update those sections of the appraisal shared with them by the main appraiser. An appraisee who is the appraisal initiator can complete any section before sharing the appraisal with the main appraiser. Thereafter, the main appraiser controls the appraisee's access to the appraisal.

Employees and contingent workers can perform all appraisal roles.

## Appraisal Types

Oracle HRMS supports three appraisal types:

- Standard appraisal
- 360-degree appraisal
- Self appraisal

### Standard Appraisal

As its name suggests, the standard appraisal supports most appraisal requirements. The format of the appraisal depends on configuration choices you make, mostly in the *appraisal template*.

See: The Appraisal Template, page 3-109

The standard appraisal can include the following sections:

- **Competencies**

In the Competencies section, you evaluate the appraisee's proficiency in measurable

skills. To include competencies in an appraisal, you must identify a *competency assessment template* in the appraisal template. Otherwise, no Competencies section appears in the appraisal.

See: Assessment Templates, page 3-111 and Assessing Competencies and Objectives, page 3-115

- **Competency Gaps**

In the Competency Gaps section, you can view the difference between an appraisee's current competency levels and those required by their job or position. This section appears in the appraisal only if you explicitly include it by personalizing the relevant SSHR pages; it does not appear by default.

- **Objectives**

In the Objectives section, you assess objectives allocated to the appraisee for the current appraisal period. To include objectives in an appraisal, you must identify an *objective assessment template* in the appraisal template. Otherwise, no Objectives section appears in the appraisal.

See: Assessment Templates, page 3-111 and Assessing Competencies and Objectives, page 3-115

**Note:** If you use appraisal templates created using the forms-based interface, the Objectives section appears in the appraisal by default.

- **Learning Path**

In the Learning Path section, you can identify training courses for the appraisee and specify target dates. You can use this section only if you also use Oracle Learning Management (OLM), and it appears in the appraisal only if you explicitly include it by selecting Include Learning Path in the appraisal template; it does not appear by default.

See: The Appraisal Template, page 3-109

- **Participants**

In the Participants section, you identify appraisers and reviewers to participate in this appraisal. For a standard appraisal, you cannot identify other participants. This section appears in the appraisal by default.

- **Questionnaires**

You can include appraisee and main appraiser questionnaires in the appraisal. Appraisers can complete the questionnaire you identify for the appraisee. Alternatively, you can select a different questionnaire when you include each appraiser in the appraisal. This section appears in the appraisal only if you select

Include Questionnaires in the appraisal template.

See: The Appraisal Template, page 3-109

**Note:** If you use appraisal templates created using the forms-based interface, the main appraiser does not have a different questionnaire from the appraisee.

### 360-Degree Appraisal

The 360-degree appraisal, also known as a *group appraisal*, is one to which an appraisee's peers, managers, and reporting staff can all contribute. It differs from the standard appraisal in one respect only: other participants can contribute to a 360-degree appraisal, but not to a standard appraisal. Appraisers and other participants can complete the appraisee questionnaire. Alternatively, you can select a different questionnaire when you include each appraiser and other participant in the appraisal.

The 360-degree appraisal can include the same sections as the standard appraisal.

### Self Appraisal

Some enterprises encourage their workers to perform regular self appraisals as a way of monitoring their own progress. No one else can view or contribute to a self appraisal. The self appraisal can include the same sections as the standard appraisal, except the Participants section.

### Updating the Competency Profile

A competency profile is a record of a worker's competencies showing their proficiency level in each competency. You create the competency profile using the forms-based interface, and you can maintain the competency profile using either the forms-based interface or the SSHR Competency Profile function. Alternatively, if you set the profile option Apply Assessment Competencies to Person to Yes, or select Update Competency Profile in the appraisal template, the application automatically updates the appraisee's competency profile to include revised competency levels when the appraisal is complete.

### Reporting and Analysis

Discoverer workbooks enable you to analyze appraisal activity for an organization hierarchy or supervisor hierarchy:

- Worksheets in the Appraisal Detail workbook provide information about multiple ongoing and completed appraisals, including appraisee name, appraisal duration, and final ratings.

See: Appraisal Detail Workbook, page 3-133

- Worksheets in the Competence Updates after Appraisal workbook enable you to view competency updates made manually or automatically when an appraisal is complete.

See: Competency Updates after Appraisal Workbook, page 3-135

## The Appraisal Process

This topic describes the standard and 360-degree appraisal process. For:

- A general introduction to appraisals in Oracle HRMS, see Appraisals Overview, page 3-88
- A description of the appraisal setup tasks, see Setting Up the Appraisal Process, page 3-105
- A description of a typical appraisal process, see An Example Appraisal Process, page 3-97

To participate in an appraisal and view completed appraisals, you use Oracle SSHR.

## Initiating the Appraisal

If you use the HRMS Workforce Performance Management function, you can define a Performance Management Plan (PMP) to create appraisals automatically on a specified date for all members of the plan. Appraisals created in this way identify either the main appraiser or the appraisee as the initiator of the appraisal. HRMS allocates the appraisal automatically to the specified initiator.

See: Performance Management Plans, page 3-43

Alternatively, either the main appraiser (usually a manager) or the appraisee can initiate a standard or 360-degree appraisal using the self-service Appraisals function.

Whether HRMS creates appraisals automatically or individuals create them using the Appraisals function, control of the appraisal depends on who is the initiator:

- A main appraiser who is the appraisal initiator controls its progress from the start. That is, the main appraiser decides when to share the appraisal with the appraisee, which information to share with the appraisee, whether to transfer appraisal ownership to the appraisee, and whether the appraisee can update the appraisal and provide feedback.
- An appraisee who is the appraisal initiator controls its progress until first sharing the appraisal with the main appraiser. The appraisee shares the whole appraisal with the main appraiser and cannot conceal particular sections. Thereafter, the main appraiser controls the progress of the appraisal, exactly as if the main appraiser were the initiator.

Managers log in as employees to initiate appraisals of themselves (self appraisals).

## Ownership of the Appraisal

Either the main appraiser or the appraisee owns the appraisal. The main appraiser transfers ownership by *sharing* the appraisal with the appraisee and leaving Main Appraiser Retains Ownership deselected. The appraisee transfers ownership by *sharing* the appraisal with the main appraiser.

When the main appraiser owns the appraisal, the appraisee:

- Cannot update the appraisal
- Can view the appraisal *up to the last sharing point*

Any changes the main appraiser makes to an in-progress appraisal after resuming ownership are not visible to the appraisee until the main appraiser shares the appraisal again.

When the appraisee owns the appraisal, the main appraiser:

- Cannot update the appraisal
- Can see all sections of the appraisal, and can view any changes the appraisee has made since resuming ownership

Ownership can transfer between the main appraiser and the appraisee as often as necessary during a single appraisal.

## Sharing Appraisals Without Transferring Ownership

If the main appraiser deselects Update Appraisal when sharing an appraisal with the appraisee, the appraisee cannot update the appraisal; however, by default, ownership of the appraisal still transfers to the appraisee. The appraisee must share the appraisal with the main appraiser to return ownership.

To enable the appraisee to view the appraisal but not gain ownership of it, the main appraiser selects Main Appraiser Retains Ownership. In this case, the main appraiser can continue to update the appraisal, and the appraisee does not need to share the appraisal in return.

Main Appraiser Retains Ownership appears only for appraisals whose status is Ongoing.

## How Appraisers, Reviewers, and Other Participants Contribute to the Appraisal

Participants in an appraisal (appraisers, reviewers, and other participants) do not own the appraisal. While the main appraiser owns the appraisal, all participants can update the appraisal. However, while the appraisee owns the appraisal, only other participants can update it; appraisers and reviewers cannot update the appraisal. Appraisers and

reviewers automatically regain their access to the appraisal when the appraisee shares it with the main appraiser again.

When the main appraiser requests feedback, participants receive workflow notifications. Each participant makes their contribution to the appraisal independently of the other participants. Participants can see changes made to the sections to which they have access, including those made after the main appraiser requests their feedback, until they apply their contribution. At that point, their view of the appraisal is frozen. They can make further updates only if the main appraiser requests feedback again.

**Note:** When participants complete their contribution to the appraisal, their participation status (as shown in each participant's notification table) is Complete. However, the appraisal remains in their notification tables until the appraisal itself is complete.

### Deleting Participants and Changing Participant Roles

You can delete a participant from an appraisal or change their role (for example, you can change an appraiser to a reviewer), provided the participant has not yet given feedback.

### Changing the Main Appraiser

When the main appraiser is the initiator of an appraisal, that person's name appears by default in the Main Appraiser field on the Setup Details page of the appraisal. When the appraisee is the initiator of an appraisal, the name of that person's manager appears by default in the Main Appraiser field. In either case, the appraisal initiator can select a different main appraiser on the Setup Details page.

As main appraiser, you can select a different main appraiser (by clicking Change Main Appraiser) once the appraisal is in progress. If you do this after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal and can neither view nor update it unless the new main appraiser explicitly requests your feedback. If you change main appraiser after completing a section of the appraisal (for example, the competency ratings), you remain listed as a participant and your contribution is retained. However, your view of the appraisal as a participant is frozen, and you can make no further changes unless the new main appraiser explicitly requests further feedback.

**Note:** If your security profile gives you access to the appraisee, you can view the appraisal regardless of your past or current involvement in the appraisal.

## The Printable Page Function

From the Appraisal Review page, you can click Printable Page to display the complete appraisal, with all sections expanded, in a separate window. You use standard browser functionality to print or save a copy of the appraisal. Alternatively, you can keep this window open for reference while you continue to work on the appraisal.

**Note:** The view of the appraisal that appears in the Printable Page window depends on your role in the appraisal. For example, the main appraiser sees the complete appraisal, whereas the appraisee's version is likely to exclude some sections.

## Appraisal Approval

You can implement your enterprise's approval process for appraisals using the standard SSHR approvals functionality.

When main appraisers give final ratings, they can add approvers and specify their position in the approvals chain. Each approver receives a workflow notification requesting their approval when the previous approver in the chain has approved. When the final approver has approved the appraisal, the main appraiser receives a workflow notification.

**Note:** Appraisals do not appear in an approver's Appraisals home page unless the approver is also an appraisal participant. Approvers can access the appraisal details from the notification message.

Any approver who disagrees with the appraisal can return it to the main appraiser for correction. The main appraiser can then update the appraisal and resubmit it to all approvers.

**Note:** If an approver rejects the appraisal rather than returning it for correction, its status is set to Deleted. You cannot update a deleted appraisal.

When you send the appraisal to approvers, you can also request the appraisee's feedback on the overall rating. In this case, the appraisee receives a request for feedback when all approvers have approved the appraisal. At the same time, the main appraiser receives a notification that the appraisee's feedback has been requested. When the appraisee provides feedback, the main appraiser receives a further notification, and the appraisal process is complete.

## Accessing Final Ratings

When the appraisal process is complete, the application automatically writes the appraisee's final rating to the Rating field in the Performance window, which you can access from the Assignment window. You can set up Compensation Workbench to access the Rating field value.

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

## Accessing Completed Appraisals

The Appraisals home page lists completed appraisals in which you have participated. For example, for an employee, the My Appraisals tab lists completed appraisals of that employee. For a manager, the Main Appraiser tab lists completed appraisals for which the manager has been main appraiser. You can specify filter values, such as appraisal purpose and appraisee, to locate particular completed appraisals in the list.

**Note:** When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

Note that your role determines your view of a completed appraisal. For example, appraisees see only information they have entered and any section shared with them by the main appraiser.

Using the View Appraisals in People Hierarchy function on the Appraisals home page, a main appraiser can also view in-progress and completed appraisals of any appraisee to whom their security profile gives them access. For example, as a manager you can view appraisals of workers who report to you, even if you have not participated in their appraisals in any role.

## The Appraisee's View of Appraisals

An appraisal appears in the appraisee's Appraisals home page if:

- The application creates the appraisal automatically from a PMP that identifies the appraisee as the initiator.
- The appraisee initiates the appraisal.
- The main appraiser transfers the appraisal to the appraisee.
- The main appraiser requests the appraisee's feedback on the overall rating.

An appraisal remains in the appraisee's Appraisals home page only until the appraisee next shares the appraisal with the main appraiser.

**Note:** If the main appraiser has transferred the appraisal to the appraisee without transferring ownership, the appraisal remains visible to the appraisee up to the sharing point; the appraisee does not need to return the appraisal to the main appraiser.

## Self Appraisal

To perform a self appraisal, you log into self-service as an employee (even if you are a manager). A self appraisal involves only the employee, and there is no approval process.

When you submit a self appraisal, its status is Completed. If you want to update a self appraisal at intervals (for example, throughout the year), use the Save as Draft function to keep the appraisal in progress rather than submitting the appraisal.

You can delete self appraisals at any time and regardless of their status.

## An Example Appraisal Process

This example process describes a standard appraisal created automatically by HRMS from a Performance Management Plan (PMP). The main appraiser is identified as the appraisal initiator. The flow described here is typical; however, the HRMS appraisals functionality is flexible enough to accommodate different process flows from the one described here.

### Initiating the Appraisal

HRMS created the appraisal automatically on the date specified in the PMP and allocated it to you as main appraiser. You:

1. Log in to Manager Self Service and select the Talent Management function.  
Your Talent Management Task List includes the task Manage Appraisals, which is enabled during the appraisal-task period.
2. You select the Manage Appraisals task, and then select the Appraise action for the first appraisee.

The appraisal template used in this example includes all available sections.

### Performing a Standard Appraisal

1. In the Appraisals Overview page, you complete the following regions:
  - The Competencies region, which already includes job competencies as specified in the competency assessment template. You add other competencies for this

employee, and enter your evaluation of all competencies.

- The Objectives region, which includes objectives to be appraised from the employee's personal scorecard. You enter a performance rating for each objective.
- The Learning Path region, where you enter courses the appraisee should attend and specify target completion dates.
- The Questionnaire region, where you complete the questionnaire identified for the main appraiser in the appraisal template.

You decide not to complete the Participants and Overall Rating and Comments regions at this point.

2. You share the appraisal with the appraisee. You decide to share:
  - Your competency ratings and comments
  - Your objective ratings and comments

You decide not to share your completed questionnaire. In addition, you do not select Overall Rating and Overall Comments because you have not yet completed these entries. The appraisee can see the Learner Path region by default.

To allow the appraisee to update the appraisal, you select Update Appraisal in the Appraisee Permissions region. You do not select Participant Details. Provide Feedback on Overall Rating is not selectable because you have not selected Overall Rating.

While the appraisee owns the appraisal, you can view the appraisal but not update it.

3. The appraisee adds their own competency and objective ratings, completes the appraisee questionnaire, and then shares the appraisal with you.
4. You review the appraisee's contributions, amend one of your own competency evaluations, and include an additional objective in the Objectives region. You also add participants to the appraisal.
5. You share the appraisal with the appraisee again. On this occasion, you select:
  - Competency Ratings and Comments, so the appraisee can view your amendment
  - Participant Details, so the appraisee can review and update the list of participants

- Update Appraisal, so the appraisee can update the appraisal (specifically, the list of participants)

**Note:** If you deselect Update Appraisal, the appraisee can view the information you are sharing but cannot update it. However, the appraisee can still provide feedback if you select Provide Feedback on Overall Rating.

You leave Main Appraiser Retains Ownership deselected because, to update the appraisal, the appraisee must own it.

**Note:** If you select Main Appraiser Retains Ownership, the appraisee can view any information you share but can neither update the appraisal nor provide feedback on the overall rating.

As you did not select Objective Ratings and Comments, the appraisee can see the list of objectives, including the objective you added in Step 4, but cannot see any of your objective ratings and comments.

While the appraisee owns the appraisal, you can view the appraisal but not update it.

6. The appraisee updates the list of participants and shares the appraisal with you again.
7. You review the revised list of participants. You remove one of the appraisers and make another a reviewer rather than an appraiser.
8. You share the appraisal with the appraisee, but this time you select Main Appraiser Retains Ownership so that you can continue to work on the appraisal. The appraisee can view latest changes but cannot make further updates.
9. You request the participants' feedback.
10. As you receive notification that participants have contributed to the appraisal, you review their contributions and make any further changes to the appraisal.
11. When all participants have contributed and you have no further changes to make, you are ready to discuss the appraisal with the appraisee. You use the Employee Review function to schedule a review meeting.

See: Entering an Employee Review, page 3-129

You use the appraisals Printable Page function to print the appraisal to take to the meeting.

12. After the review meeting, you give final ratings and request approval. In the Details

to be Shared with Appraisee region of the Final Ratings page, you select:

- Additional Details, so that the appraisee can see latest changes to those sections of the appraisal to which the appraisee already has access
- Overall Comments
- Overall Rating
- Provide Feedback on Overall Rating, so that the appraisee can comment

You decide not to share participant names and ratings.

13. Each approver in the approvals chain receives notification when their approval is required. One approver returns the appraisal for correction.
14. You update the appraisal to address their concerns and send the appraisal to all approvers and recipients again.

This time, all approvers approve the appraisal.

15. The appraisee receives a request for feedback on their overall rating. The appraisee reviews the sections of the appraisal you have allowed them to see, including the overall rating and comments, and provides feedback.

The appraisal process is now complete.

For a summary of the appraisals workflow notification messages, see: Appraisals Workflow Notifications, page 3-100

## Appraisals Workflow Notifications

This topic provides a summary of workflow notifications, organized by appraisal role, specific to standard or 360-degree appraisals. For notifications you generate, it identifies the action that generates the notification, who receives it, and how it affects your access to the appraisal. For notifications you receive, it identifies the message subject and any actions you need to take.

## Main Appraiser

### *Notifications the Main Appraiser Generates*

<b>Action</b>	<b>Notification Sent To</b>	<b>Effect on Appraisal Access</b>
Share With Appraisee and Transfer Appraisal Ownership	Appraisee	You continue to view all parts of the appraisal, but cannot update it until the appraisee shares the appraisal with you again.
Share With Appraisee and Retain Appraisal Ownership	Appraisee	You can continue to update all sections of the appraisal.
Change Main Appraiser	New Main Appraiser	If you change main appraiser after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal and can neither view nor update it. If you change main appraiser after completing some sections of the appraisal, you remain listed as an appraiser, and any information you enter is retained. However, you can make no further changes to the appraisal. In either case, you can view the appraisal if your security profile gives you access to the appraisee.
Request Feedback	Participants (Appraisers, Reviewers, Other Participants)	Your access to the appraisal is unaffected.
Add Approvers and Recipients	Approvers and Recipients	You can view but not update the appraisal.

### Notifications the Main Appraiser Receives

Notification Message	Action
The appraisal of <i>appraisee</i> needs your attention as main appraiser.	Review and update the appraisal.
You have been selected as main appraiser for the appraisal of <i>appraisee</i> .	Continue the appraisal.
<i>Participant</i> has completed their appraisal of <i>appraisee</i> .	Review the participant's contribution.
Appraisal for <i>appraisee</i> has been approved.	No action required.
Appraisal for <i>appraisee</i> has been approved and is pending appraisee feedback.	No action required.
Appraisee <i>appraisee</i> has provided feedback on appraisal.	Review the appraisee feedback.

## Appraisee

**Note:** The main appraiser determines the appraisee's view of an appraisal. For example, if the main appraiser shares competency comments and ratings with the appraisee, the appraisee can view those items. Otherwise, they are not visible to the appraisee.

### Notifications the Appraisee Generates

Action	Notification Sent To	Effect on Appraisal Access
Share with Main Appraiser	Main Appraiser	You can access your view of the appraisal up to latest the sharing point. You cannot update the appraisal again until the main appraiser shares the appraisal with you and allows you to update it.

### ***Notifications the Appraiser Receives***

<b>Notification Message</b>	<b>Action</b>
Your appraisal has been transferred to you.	Review the appraisal, make any permitted updates, and share the appraisal with the main appraiser.
View latest details of your appraisal.	Review the appraisal. You cannot update the appraisal and do not need to share the appraisal with the main appraiser.
Your appraisal has been completed.	No action required.
Your appraisal has been completed. Please review and provide feedback	Click Details on the Appraisals tab, review the appraisal, then click Share with Main Appraiser. Enter your comments in the Feedback field.

## **Appraiser**

### ***Notifications the Appraiser Generates***

<b>Action</b>	<b>Notification Sent To</b>	<b>Effect on Appraisal Access</b>
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see anything you could see before you entered your contribution and clicked Complete, but nothing entered after that point. You can make no further updates unless the main appraiser notifies you again.

### **Notifications the Appraiser Receives**

<b>Notification Message</b>	<b>Action</b>
The appraisal of <i>appraisee</i> needs your attention as appraiser.	Update the appraisal to provide your input. Note that you can update the appraisal only while the main appraiser owns it. While the appraisee owns the appraisal, only other participants can update it.

## **Reviewer**

### **Notifications the Reviewer Generates**

<b>Action</b>	<b>Notification Sent To</b>	<b>Effect on Appraisal Access</b>
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see anything you could see before you entered your contribution and clicked Complete, but nothing entered after that point. You can make no further updates unless the main appraiser notifies you again.

### **Notifications the Reviewer Receives**

<b>Notification Message</b>	<b>Action</b>
The appraisal of <i>appraisee</i> needs your attention as reviewer.	Review the appraisal and enter your comments. Note that you can update the appraisal only while the main appraiser owns it. While the appraisee owns the appraisal, only other participants can update it.

## **Other Participant**

Other participants are involved in 360-degree appraisals only.

### **Notifications the Other Participant Generates**

<b>Action</b>	<b>Notification Sent To</b>	<b>Effect on Appraisal Access</b>
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see the questionnaire you completed and the comments you entered, but can make no further updates unless the main appraiser notifies you again.

### **Notifications the Other Participant Receives**

<b>Notification Message</b>	<b>Action</b>
The appraisal of <i>appraisee</i> needs your attention as other participant.	Complete the questionnaire and provide overall comments.

## **Setting Up the Appraisal Process**

This topic brings together several tasks that affect the appraisal process. You may already have performed some of these tasks during implementation of HRMS and SSHR.

### **To set up the appraisal process:**

1. During an appraisal, HRMS can allocate a rating to each objective and competency based on standard calculations. Alternatively, you can define your own formulas to calculate objective and competency ratings.

See: Assessing Competencies and Objectives, page 3-115

2. To include competencies in an appraisal, create one or more competency assessment templates. HR Professionals and other authorized users create competency assessment templates using the Manage Competency Assessment Templates function.

See: Assessment Templates, page 3-111

3. To include objectives in an appraisal, create one or more objective assessment templates. HR Professionals and other authorized users can create objective

assessment templates using the Manage Objective Assessment Templates function.

See: Assessment Templates, page 3-111

4. For rating overall performance, identify an existing performance rating scale or create a new performance rating scale. You select this rating scale when you define the appraisal template.

See: Defining Rating Scales, page 3-15

Alternatively, you can write a formula to calculate a final rating based on a worker's final scores for competencies and objectives. (In this case, you select both a rating scale and a formula when you define the appraisal template.)

See: Assessing Competencies and Objectives, page 3-115

5. Identify or create questionnaires to include in the appraisal. If you omit this step, you cannot select questionnaires for the appraisee and main appraiser when you define the appraisal template. For 360-degree appraisals, you must define a questionnaire.

See: The Appraisal Template, page 3-109

6. Create an appraisal template to configure the appraisal. You must create at least one appraisal template, and you can create several if you want to use a different template for each appraisal type or purpose.

To create the appraisal template, HR Professionals and other authorized users use the Manage Appraisal Templates function.

See: The Appraisal Template, page 3-109

7. Review current settings of these profile options, and update if necessary:

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Apply Assessment Competencies to Person	Controls whether HRMS updates an appraisee's competency profile automatically when an appraisal is complete. By default, this option is set to No.
HR: Appraisee Can Add Participants	Controls whether appraisees can add appraisers, reviewers, and other participants to their appraisal. By default, this option is set to Yes.
HR: Manager Appraisals Menu	Controls the types of appraisal a manager can create. By default, this option is set to Manager Appraisals Menu.

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HR: Save and Stay in Appraisals Page	Controls page display when you click Save as Draft. By default, the current page remains displayed, and you can continue to edit the appraisal. If you set this option to No, the Appraisals home page replaces the current page.
HR: Worker Appraisals Menu	Controls the types of appraisal a worker can create. By default, this option is set to Employee Appraisals Menu.
Talent Management Source Type	Enables you to select a default value from the PROFICIENCY_SOURCE (Source of Proficiency Rating) user lookup. HRMS uses this value when updating a person's competency profile automatically.

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

**Note:** Apply Assessment Competencies to Person applies at the site level. As an alternative, you can select Update Competency Profile in the appraisal template, which sets this feature at template level.

You can set the HR: Appraisee Can Add Participants option to No and select Add Participant in the Appraisee Permissions region of the appraisal template, which sets this feature at the template level.

8. Edit the APPRAISAL\_TYPE lookup to include your enterprise's appraisal types. The values you specify here populate the Appraisal Purpose list on the SSHR Appraisal Setup page.

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

9. If appropriate, edit the APPRAISAL\_ASSESSMENT\_STATUS lookup to update the appraisal status values.

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

10. When an appraisal is complete, HRMS automatically updates the following fields in the Performance window:

- Rating

This field contains the appraisee's overall rating.

- Date

This field contains the appraisal completion date.

- Type

This field contains the interview type with the code APPRAISAL from the EMP\_INTERVIEW\_TYPE lookup. To ensure that HRMS populates the Type field, you must update the lookup EMP\_INTERVIEW\_TYPE.

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

11. When you create a new appraisal using the self-service Appraisals function, you select an appraisal template in the Appraisal Setup Details page. You can personalize the Appraisal Setup Details page for each type of appraisal to identify a default appraisal template.

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

12. A manager can view all appraisals for an individual in a people hierarchy. By default, the people hierarchy excludes ex-employees. To include appraisals of ex-employees, you edit the relevant function.

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

13. Configure components of the SSHR Appraisals pages, such as flexfields, instruction text, and messages. In addition, you can include or exclude specific regions of the pages.

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

**Note:** You can use function-level personalization to personalize the entire appraisal process under a single function.

See: *The Personalization Framework, Oracle SSHR Deploy Self-Service Capability Guide*

14. Define your approvals process for appraisals, and use the Oracle Workflow Builder to configure the process.

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

You are now ready to perform an appraisal.

See: *The Appraisal Process, page 3-92*

# Appraisal and Assessment Templates

## The Appraisal Template

The appraisal template is the design document for an appraisal. Its main function is to configure all sections of the appraisal to suit the appraisal purpose or enterprise requirements: you can use a single appraisal template throughout the enterprise.

## Configuring the Appraisal

When you create an appraisal template, you can:

- Specify validity dates. Outside these dates, the template is not available for use. You can use these dates to associate the template with a performance-management period, for example.
- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them.

If the appraisal template has global scope, any assessment templates, questionnaires, and rating scales that you include in the template must also have global scope. If the appraisal template has local scope, any assessment templates and questionnaires that you include in the template must be local to the same business group as the appraisal template. Rating scales, however, can be either global or local.

- Include instructions to appraisal participants. These instructions appear, formatted as you specify, on the Appraisal Overview page.

## Assessing Competencies and Objectives

To assess competencies during an appraisal, you must select or create a competency assessment template in the appraisal template. Otherwise, the Competencies region does not appear in appraisals. The Update Competency Profile option, which determines whether the application updates competency profiles automatically after the appraisal, appears after you identify a competency assessment template.

To assess objectives during an appraisal, you must select or create an objective assessment template in the appraisal template. Otherwise, the Objectives region does not appear in appraisals.

See: Assessment Templates, page 3-111

To allocate a final rating to the appraisee, you select a performance-rating scale. In addition, you can select an Appraisal Total Score Formula to identify the appropriate

final rating from the selected performance-rating scale. The formula, which you write, can base any calculations on the worker's total scores for competencies and objectives. The rating identified by the formula appears as the worker's Suggested Overall Rating on the Final Ratings page of the appraisal. HRMS supplies some example formulas for calculating the appraisal total score.

See: Assessing Competencies and Objectives, page 3-115

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

### **Including the Learning Path Region**

In the Learning Path region of an appraisal, you can identify training courses for the appraisee. You select the Include Learning Path option to include the region in appraisals.

### **Setting the Appraisal Sharing Options**

When main appraisers share appraisals with appraisees, they specify which information the appraisee can view and whether the appraisee can update the appraisal. For example, to share competency ratings and comments, the main appraiser selects the Competency Ratings and Comments check box. By default, no sharing option is selected, but you can change this initial setting for appraisals that use this template. The main appraiser can override these initial appraisal-sharing options in appraisals that use the template.

### **Including Questionnaires**

You can attach appraisee and main appraiser questionnaires to the appraisal template.

The appraisee questionnaire is available to the appraisee, appraisers, and other participants. When you add appraisers and other participants to an appraisal, you can select either Default Questionnaire (which is the appraisee questionnaire) or a different questionnaire.

The main appraiser has no default questionnaire. If you want the main appraiser to complete a questionnaire, you must select it explicitly. You can select the same questionnaire for both the main appraiser and the appraisee.

To create a questionnaire, you use the Questionnaire Administration function.

### **Questionnaire Scope**

To include the same questionnaire in all appraisals in enterprises that use multiple business groups, define the questionnaire with global scope. Otherwise, questionnaires are available only in the business group in which you create them.

### **Publication Status of Questionnaires**

Any questionnaire that you attach to an appraisal template must have the status

Published. You can publish a questionnaire either when you create it or at a later date (after review of the questionnaire, for example).

You can change the status of a questionnaire from Published to Unpublished at any time, even if the questionnaire is currently in use in appraisals or simply attached to an appraisal template. This feature enables you to prevent future use of a questionnaire. For example, if you create a different questionnaire for each year's appraisals, you can prevent next year's appraisals from using this year's questionnaire by setting its status to Unpublished.

## Creating an Appraisal Template

To create an appraisal template, you use the Manage Appraisal Templates function. You can access this function from the HR Professional menu, where it appears by default.

You can define as many appraisal templates as you need to meet enterprise requirements. For example, you could define a different template for each Performance Management Plan or different templates for each appraisal purpose (such as annual appraisal, exit appraisal, or benchmarking appraisal). Alternatively, you can use a single appraisal template for all appraisals.

**Note:** You can continue to use appraisal templates created in the Appraisal Template window of the forms-based interface. However, their scope is local only. To update or delete these templates, use the Manage Appraisal Templates function.

In the Search region of the Manage Appraisal Templates function, you can search for existing templates created using either this function or the Appraisal Template window. When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

## Assessment Templates

To assess competencies and objectives during an appraisal, you must include a competency assessment template and an objective assessment template in the appraisal template. You design competency assessment templates and objective assessment templates to meet enterprise requirements.

## Competency Assessment Templates

The competency assessment template specifies how to assess competencies in appraisals. When you create a competency assessment template, you can:

- Specify validity dates. Outside these dates, you cannot use the template. These

dates must not conflict with the validity dates of the appraisal template in which the competency assessment template appears. For example, if the appraisal template has no valid-to date, the competency assessment template must have no valid-to date.

- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them. The scope must match the scope of any appraisal template in which the competency assessment template appears.
- Include instructions to participants. These instructions appear, formatted as you specify, in the Competencies region of the Appraisal Overview page.
- Identify competencies that you want to assess. For example, you can include competencies required by a worker's job in the appraisal. Selections that you make in the competency assessment template apply to all users of the template. However, during the appraisal you can tailor the Competencies region to suit the appraisee.

**Note:** You can delete job competencies from a worker's appraisal, but you cannot delete from an appraisal other competencies that appear in the competency assessment template.

### Selecting a Rating Scale Type for Competencies

To specify how HRMS will calculate scores for individual competencies, you select a rating scale type. HRMS can calculate scores based on performance, proficiency, or both. In addition, HRMS can apply a weighting value to either performance or proficiency.

Alternatively, you can select Fast-Formula-Based Line Scoring and enter a formula name. The selected formula calculates a score for each competency using specified performance, proficiency, and weighting values. HRMS supplies sample formulas for calculating competency scores; you can also define your own.

See: *Assessing Competencies and Objectives*, page 3-115

See: *Writing Formulas for Rating Competencies and Objectives*, *Oracle HRMS FastFormula User Guide*

Whether you use a formula or one of the standard HRMS calculation methods, you specify whether the total competency score is the average or the sum of all competency ratings.

The score for each competency (the line score) and the total competency score appear in the Final Ratings page of the appraisal.

## Creating Competency Assessment Templates

To create a competency assessment template, you use the Manage Competency Templates function. You can access this function from:

- The HR Professional menu, where it appears by default
- The Manage Appraisal Templates function, when you click Create Competency Template

In this case, the competency assessment template has the same name and validity dates as the appraisal template.

You define as many competency assessment templates as you need to meet enterprise requirements. For example, you could tailor competency assessment templates to jobs, positions, or even individuals. Alternatively, you could define an assessment template for your enterprise's core competencies, and the main appraiser or appraisee can include additional competencies, such as those appropriate to a job or an individual, during the appraisal. You can even define a competency assessment template that contains no competencies; in this case, the main appraiser or appraisee includes all relevant competencies during the appraisal.

**Note:** You can continue to use competency assessment templates created in the Assessment Template window of the forms-based interface. However, their scope is local only. To update or delete these templates, use the Manage Competency Templates function.

## Objective Assessment Templates

The objective assessment template specifies how to assess objectives in appraisals. When you create an objective assessment template, you can:

- Specify validity dates. Outside these dates, you cannot use the template. These dates must not conflict with the validity dates of the appraisal template in which the objective assessment template appears. For example, if the appraisal template has no valid-to date, the objective assessment template must have no valid-to date.
- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them. The scope must match the scope of any appraisal template in which the objective assessment template appears.
- Include instructions to participants. These instructions appear, formatted as you specify, in the Objectives section of the appraisal.

For appraisals created automatically, HRMS copies the worker's personal scorecard of objectives to the Objectives region of the appraisal. Otherwise, the main appraiser and

appraisee populate the Objectives region during the appraisal.

### Selecting a Rating Scale Type for Objectives

To specify how HRMS will calculate scores for objectives, you select a rating scale type. You can select a performance scale, from which users select a rating for each objective. If the objective's definition includes a weighting value, HRMS multiplies performance by weighting to give a score for each objective. Otherwise the performance rating is the objective score.

Alternatively, you can select Fast-Formula-Based Line Scoring and enter the name of a formula to calculate a score for each objective. HRMS supplies sample formulas for calculating objective scores; you can also define your own.

See: Assessing Competencies and Objectives, page 3-115

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

Whether you use a formula or select a performance scale, you specify whether the total objectives score is the average or the sum of all objective ratings.

The score for each objective (the line score) and the total objective score appear in the Final Ratings page of the appraisal.

### Creating Objective Assessment Templates

To create an objective assessment template, you use the Manage Objective Templates function. You can access this function from:

- The HR Professional menu, where it appears by default
- The Manage Appraisal Templates function, when you click Create Objective Template

In this case, the objective assessment template has the same name and validity dates as the appraisal template.

You define as many objective assessment templates as you need to meet enterprise requirements. For example, if you use a different formula to calculate objective scores for each job or position, you define multiple objective assessment templates. You may also want to define a different objective assessment template for each performance-management period.

### Managing Existing Templates

In the Search region of the Manage Competency Templates and Manage Objective Templates pages, you can search for existing templates created using either these functions or the Assessment Template window. When you tab out of a field in the Search region that has an associated Search window, that window does not open

automatically. Click the Search icon to display the Search window.

## Assessing Competencies and Objectives

During an appraisal, each participant can allocate ratings to individual competencies and objectives to indicate a worker's level of achievement. The main appraiser can also allocate an overall rating to a worker's performance for the appraisal period.

### Assessing Competencies

When you define a competency, you specify how you will measure a worker's proficiency in that competency. You can:

- Specify proficiency levels that are unique to the competency.
- Select a general proficiency-rating scale.

See: Competency Measurement, page 3-12

The competency assessment template defines how you will assess a worker's competencies during an appraisal. You can assess:

- Proficiency only
- Performance only
- Both proficiency and performance

You can also apply a weighting value to either proficiency or performance. The competency assessment template identifies any performance and weighting scales you will use.

HRMS calculates a score for each competency (a competency line score) and a total score for all competencies. These scores appear in the Competency Ratings region of the Final Ratings page of the appraisal.

To calculate competency line scores, HRMS can use one of the following standard calculations:

<b>Rating-Scale Type</b>	<b>Score Derived From:</b>
Performance	Performance
Proficiency	Proficiency
Performance and Proficiency	Proficiency multiplied by Performance

Rating-Scale Type	Score Derived From:
Performance and Proficiency, Weighting for Performance	Performance multiplied by Weighting
Performance and Proficiency, Weighting for Proficiency	Proficiency multiplied by Weighting
Performance with Weighting	Performance multiplied by Weighting
Proficiency with Weighting	Proficiency multiplied by Weighting

For example, if you select the rating-scale type "Performance and Proficiency, Weighting for Performance," the application multiplies performance by weighting to produce the competency line score.

As an alternative to the standard calculations, you can select Fast-Formula-Based Line Scoring and identify a formula in the competency assessment template to calculate competency line scores.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: Assessment Templates, page 3-111

The total score for all competencies can be either the average or the sum of the competency line scores. For the following example, the total score can be either 18 (if you select Sum) or 6 (if you select Average).

Competency	Competency Line Score
Competency 1	4
Competency 2	4
Competency 3	10

## How HRMS Calculates Competency Line Scores

If you select the rating-scale type Fast-Formula-Based Line Scoring and select one of the supplied sample formulas (such as PERF\_X\_WEIGHTING), the calculation that the application performs to produce a competency line score differs from the calculation it performs when you select one of the standard rating-scale types (for example,

Performance with Weighting). In some cases, this variation in the calculation may produce slightly different results for identical data.

To illustrate the differences that the calculation method can produce, consider the example competency Develop Leadership Skills. For this competency, the participants' ratings are as follows:

Participant	Proficiency	Performance	Weighting
1	4	3	3
2	4	4	3
3	3	2	2

### If You Select Fast-Formula-Based Line Scoring

If you select the rating-scale type Fast-Formula-Based Line Scoring and the formula PERF\_X\_WEIGHTING in the Competency Assessment Template, the application:

1. Calculates the average weighting for the competency by dividing the total of the weighting values (8, in this example) by the number of participants (3).
2. Calculates the average performance rating for the competency by dividing the total of the performance scores (9, in this example) by the number of participants (3).
3. Multiplies the average weighting by the average performance rating (for example,  $(8 / 3) * 3 = 8$ ). The result of this calculation (8, in this example) is the competency line score (the appraisee's rating) for the competency Develop Leadership Skills.

### If You Do Not Select Fast-Formula-Based Line Scoring

If you select a rating-scale type other than Fast-Formula-Based Line Scoring (for this example, Performance with Weighting) in the Competency Assessment Template, the application:

1. Multiplies performance by weighting to produce each participant's competency line score. For the example competency Develop Leadership Skills, the results are:
  - Participant 1 = 9
  - Participant 2 = 12
  - Participant 3 = 4
2. Sums the participants' competency line scores to produce a total score for the

competency (for example,  $9 + 12 + 4 = 25$ ).

3. Divides the total score by the number of participants to produce the average score (for example,  $25 / 3 = 8.33$ ). The result of this calculation (8.33) is the competency line score (the appraisee's rating) for the competency Develop Leadership Skills.

As you can see from these examples, the results produced by each approach may not be identical, even though the assessment data is identical and the type of calculation (performance multiplied by weighting) is the same in both cases. Therefore, to ensure consistent results, you are recommended to use only one of these two approaches for any group of employees whose results you need to compare.

## Assessing Objectives

During an appraisal, HRMS calculates a score for each objective and a total score for all objectives. These scores appear in the Objective Ratings region of the Final Ratings page of the appraisal.

How HRMS produces the objective line score (the score for an individual objective) depends on the rating-scale type you select in the objective-assessment template. If you select Performance and identify a performance scale, the application calculates the average of all participants' performance ratings for the objective to produce the objective line score. If you select Fast-Formula-Based Line Scoring, how the application calculates the objective line score depends on the formula you select. Possible inputs to the formula are each participant's performance rating and any weighting value included in the objective's definition. HRMS supplies two sample formulas, and you can also provide your own.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: Assessment Templates, page 3-111

The total score for all objectives can be either the average or the sum of the individual scores. For the following example, the total score can be either 12 (if you select Sum) or 3 (if you select Average).

Objective	Objective Line Score
Objective 1	4
Objective 2	3
Objective 3	3
Objective 4	2

## Producing a Combined Score for Objectives and Competencies

In the appraisal template, you can select a formula for calculating a combined score for competencies and objectives. Inputs to the formula are the total scores for objectives and competencies. The output from the formula is a rating level ID that identifies a rating level in the final-rating scale named in the appraisal template. The application displays the associated rating level as the appraisee's suggested overall rating in the Overall Rating and Comments region of the appraisal Final Ratings page.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: The Appraisal Template, page 3-109

## Viewing Appraisal Templates

**Note:** You cannot use the Appraisal Template window to create new appraisal templates or update existing appraisal templates. Instead, you use the Manage Appraisal Templates function.

See: The Appraisal Template, page 3-109

You can view appraisal templates in the Appraisal Template window, provided that you created them in this window. You cannot use this window to view templates created using the Manage Appraisal Templates function.

### To view an appraisal template:

1. From the View menu, select Query By Example, then select Enter.
2. Enter search values, such as the complete or partial name of an appraisal template.
3. From the View menu, select Query By Example, then select Run. Scroll through the results if the search returns multiple appraisal templates.

## Viewing Competency Assessment Templates

**Note:** You cannot use the Assessment Template window to create new assessment templates or update existing assessment templates. Instead, you use the Manage Competency Templates and Manage Objective Templates functions.

See: Assessment Templates, page 3-111

You can view competency assessment templates in the Assessment Template window,

provided that you created them in this window. You cannot use this window to view templates created using the Manage Competency Templates or Manage Objective Templates function.

**To view an assessment template:**

1. From the View menu, select Query By Example, then select Enter.
2. Enter search values, such as the complete or partial name of an assessment template.
3. From the View menu, select Query By Example, then select Run. Scroll through the results if the search returns multiple assessment templates. For any assessment template, the Performance Scale, Weighting Scale, and Competencies buttons are enabled only if the template includes such information. Otherwise, these buttons are disabled.

# Career Paths

## Career Paths

A career path defines a route to a job or position from a different job or position that is lower in the hierarchy. You can base career paths on either job progression or position progression, but not both. A job or position can appear in multiple career paths, but once only in any single career path.

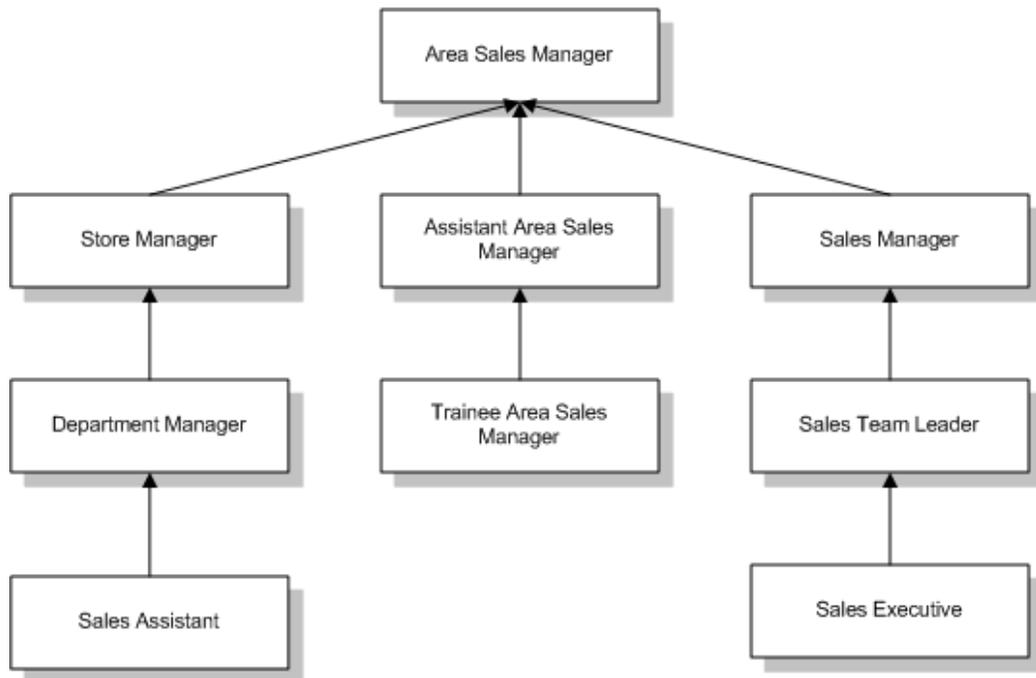
You can identify career paths for a worker in various ways. For example, you can include the names of possible career paths:

- In the Overall Rating and Comments or Advancement Potential sections of the worker's appraisal
- In appraisal questionnaires
- In a document or in comments attached to a worker's record

## Career Paths Based on Job Progression

The career path is a hierarchy of jobs that you build from the top down. For example, for the job Area Sales Manager, you could define the following career path to show possible routes to that job:

## Job-Based Career Path



See: Defining Career Paths, page 3-122

### Lines of Progression for Affirmative Action Plan (AAP) Reporting (U.S. Only)

For the AAP-Workforce Analysis report, you use career paths based on job progression to define lines of progression.

### Career Paths Based on Position Progression

For career paths based on position progression, you define a standard position hierarchy.

See: Creating a Position Hierarchy, *Oracle HRMS Enterprise and Workforce Management Guide*

## Defining Career Paths

A career path shows a route to a job or position from a different job or position.

You define career paths for positions using position hierarchies.

See: Position Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

You define career paths for jobs using the Career Path Names window and the Map

Career Path window.

**To define a career path based on job progression:**

1. In the Career Path Names window, enter the names of the career paths you want to define.
2. Save your work.
3. Open the Map Career Path window. In the Name field, select the top job in the career path you are mapping.
4. In the Career Path Name field, select the name of a career path you defined in Step 1.
5. In the Job Progression From block, select all jobs that are one level down from the job identified in the Name field.
6. To extend the career path downwards from any one of these jobs, select the relevant Down check box.  
  
The window now shows your selected job in the Name field. The Job Progression To field now shows the job at the top of the career path.
7. Repeat Steps 5 and 6 until the career path is fully defined. To move back up the career path, select the Up check box.
8. Save your work.

# Skills Matching

## The Special Information Approach to Skills Matching

From Release 11 onwards, the recommended approach to holding and matching skills information is to define a framework of competencies. These provide the common language for a wide range of human resource activities including assessments, appraisals, employee profiling, career development, and recruitment. You can build up a wealth of skills information that can be maintained and used by employees and line managers themselves, using the web Direct Access interface.

However, Oracle HRMS continues to support the earlier approach to handling skills information, using Special Information Types. This is an alternative to the competence approach.

### What are Special Information Types (SITs)?

Special Information Types are a flexible way to hold additional information you require about people and, if necessary, to compare this information with the requirements of jobs or positions. For each Special Information Type you can define up to thirty fields to hold details of competencies, professional qualifications, education, and valid experience. For each person, job, or position, you can make multiple entries for each Special Information Type.

For example, suppose you want to store details of technical skills. You could set up the following fields:

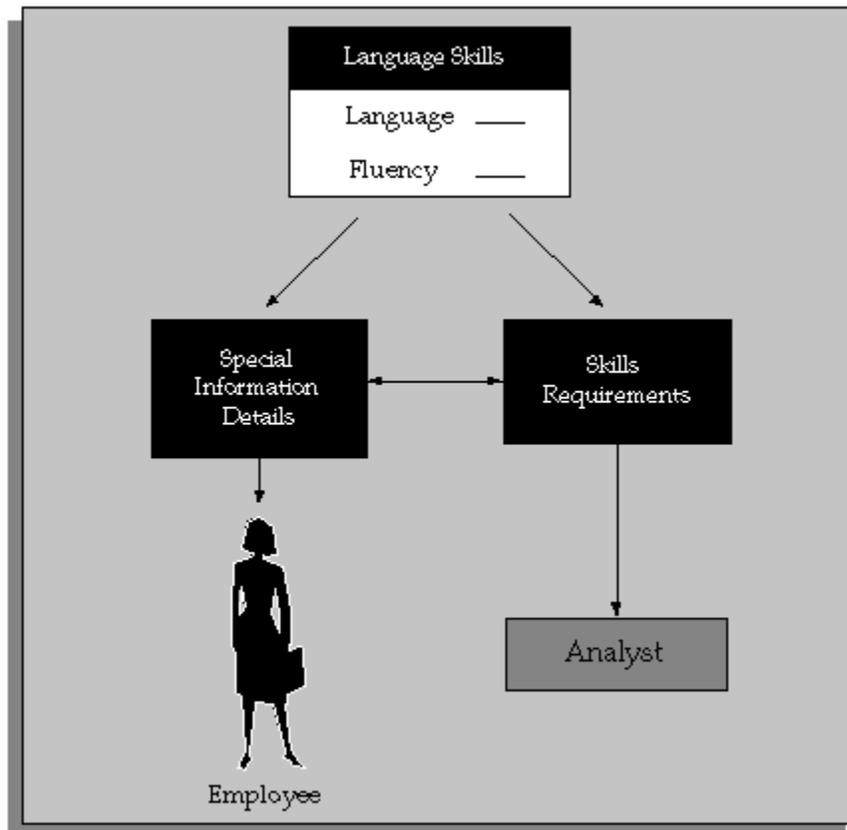
- Skills - with a list of valid values to control the vocabulary used to describe the skills
- Years Experience - to hold the number of years of experience in using the skills

You can display the fields you define in one or more of the following windows:

- Special Information, to record skills or experience for an employee or applicant
- Job Requirements, to hold skill requirements for a job
- Position Requirements, to hold skill requirements for a position
- Skill Provisions, to record the skills or qualifications provided by training activities in Oracle Training Administration

Using views and reports, you can then match people to posts, according to their skills or other attributes.

## Matching Skills Requirements to Special Information



### Tips for Defining Special Information Types to Hold Skills Information

- If you want to give different sets of people access to different categories of skills information, define each category as a separate Special Information Type. You can configure the Special Information window to display just one Special Information Type.
- If you want to match on a *range* of skills levels, it is easier to use numeric values. Use a description field to provide the meaning for each level. The description appears automatically when the number is chosen.
- You can use cross-validation to ensure that users enter correct combinations of segments. For example, you could ensure that when a language skill is entered, a fluency level is also selected.
- You can speed up data entry and minimize errors by defining an 'Alias' for common combinations of segment values. For example, completion of a course may always result in a specific certificate from a particular licensing body. A user could enter all of these values with a single Alias.

- If you want users to enter the precise title of a qualification (perhaps read from a resume), you cannot supply a list of values. However, consider providing additional fields with lists of values using broad terms such as 'degree-level' or 'science' to help users searching for information.

## Unstructured Information

You may want to hold some skills information, such as resumes, as unstructured, free text information. You can store this information as attachments to the People and Special Information windows.

## Skills Matching Report

The standard Skills Matching Report matches people against all the requirements you have entered for one job or position (held in Special Information Types).

The List People By Special Information window displays a list of people who match a particular profile for one Special Information Type.

## Running the Skills Matching Report

This report matches employees, applicants, or both against the requirements of one job or position (held in Special Information Types). You can select the closeness of the match you require.

You run reports in the Submit Requests window.

### To run the Skills Matching Report:

1. In the Name field, select Job and Position Skills Matching Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the Job or Position to which you want to match people.
4. Select the person type, or types, you require.
5. Select the closeness of match you require from one of the following levels:
  - One or more essential skills
  - All essential skills
  - All essential and one or more desirable skills
6. Choose the Submit button.

# Event and Attendance Administration

## Event and Attendance Administration

You can use the events and attendance administration features in Oracle Human Resources to:

- Set up events
- Book employees and applicants onto events
- Record information about employee interviews, such as disciplinary hearings and performance reviews

**Note:** The system administrator can create configured versions of the Event Bookings window so that you use one version for employees and another version for applicants.

## Event Bookings and Attendance

You can view all the events a person has attended or is scheduled to attend in the Book Events window. You can also enter new bookings here.

## Employee Reviews

You can use the Employee Review window to record information about any employee interview, such as a performance review, disciplinary hearing, or medical test.

To prepare for a performance review, you can view the employee's:

- Career history, using the Assignment History window  
See: Viewing a Worker's Assignment History, page 2-212
- Likely career paths  
See: Career Paths, page 3-121

If you are using Oracle Self-Service Human Resources (SSHR), you can use web-based access to complete assessment and appraisal templates for your employees.

## Events, Reviews and Competence Profiles

If you have adopted the competence approach, you can use events or reviews as an opportunity to update your employees' competence profiles. For example, you may

decide that employees' attendance at a team-leading seminar provided them with the Team-Leading competence at level 1. Once you have determined the competencies delivered by the event, you can update the appropriate employees' competence profiles.

## Entering Performance Ratings

You carry forward details from the Employee Review window to the Performance window (which opens from the Salary Administration window). In this window, you can enter performance ratings for an employee at any time. You can also schedule the next performance review, and, optionally, associate a salary change with a performance review.

**Note:** You cannot use a performance review entered through Oracle Self-Service Human Resources (SSHR).

In order to perform this task, performance rating values for the Lookup Type PERFORMANCE\_RATING must have been defined.

### To enter a performance rating for an existing review:

1. Select an existing review by one or all of the following:
  - Date
  - Location
  - Type
2. Select a performance rating.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically).

### To enter a new review and performance rating:

1. Enter the new review date.
2. Select a performance rating, if required.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically)

## Entering an Employee Review

You can record details of a review event using the Employee Review window.

Before you can enter employee reviews, different types of employee interview must have been defined as values for the Lookup Type EMP\_INTERVIEW\_TYPE. These interview types could include disciplinary hearings and performance reviews.

### To enter a review for an employee:

1. Select an interview type, and enter a start date. The other fields are optional.

If you select a location for the employee's review that has a time zone associated with it, the Timezone field displays the time zone with that location, regardless of your location.

2. Save the review.

3. You can select reviewers by name or employee number. Save your work.

If you want to enter a performance rating for the employee associated with this review, navigate to the Assignment or Salary Administration window.

See: Entering Performance Ratings, page 3-128

## Creating an Event

You use the Event Bookings window to create training events.

**Tip:** You could set up the Additional Event Details descriptive flexfield to record booking statuses (such as Wait Listed, Confirmed, and Attended). This descriptive flexfield displays on the Event Bookings window, the Employee Review window, and the Applicant Interview window.

Before you can create events, event types, such as departmental meeting or marketing presentation, must be defined as values for the Lookup Types EMP\_EVENT\_TYPE and APL\_EVENT\_TYPE.

**U.S. only:** All Tenure-specific events must begin with the word Tenure.

### To create an event:

1. Select the type of event then enter the date, time, supplying organization, location, and contact name.

**Note:** You can only select locations that are associated with a timezone. You associate a location with a timezone in the Location window.

2. Save the event.
3. You can select attendees by name or number in the Bookings block of this window.

# Workforce Intelligence Key Concepts for Competencies, Qualifications and Development

## Key Concepts for Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications and Development Intelligence enables you to investigate the competencies and proficiencies of employees and applicants.

The following concepts enable you to accurately interpret the results of the Competencies, Qualifications and Development intelligence reports:

### Competencies and Proficiencies

Within Oracle HRMS, you define competencies and proficiencies against a person and job. If a person has multiple assignments for the same job, these reports only count the person once. This ensures that trends remain accurate.

In order to appear in the reports, people must work for the required job and grade for a competence on the report run date.

**Note:** You must define competencies against jobs, and assign valid grades to jobs, or these reports will not be able to compare individual's proficiencies with their job competence requirements.

# Workforce Intelligence for Competencies, Qualifications and Development

## Competence (Skill) Development Detail Workbook

This workbook investigates the skills of your workforce, with regard to skills held by workers, skills required, or skills delivered through training, within your organization. The resulting information enables you to:

- View competencies owned by workers within your organization
- Analyze competence shortages within your organization
- Analyze competencies delivered by training

## Worksheets

This workbook has the following worksheets:

- Competence Delivered by Training Activity
- Competence Requirement
- Person Competence Profile

## Competence Delivered by Training Activity Worksheet

This worksheet reports on competencies delivered by training activities and events. The resulting information enables you to:

- Compare the competencies delivered by training to those required.
- Analyze training efficiency.

## Business Questions

*Which competencies do courses provide?*

## Competence Requirement Worksheet

This worksheet displays competence requirements for all organizations within a business group. The worksheet enables you to analyze competence requirements for business groups, organizations, jobs, positions, and grades. For each requirement you

can investigate the:

- Competencies needed for a particular job.
- Skills shortages within an organization.

### **Business Questions**

*Which jobs require a particular competence, and at what level?*

### **Headings and Calculations**

This worksheet uses the following calculations:

- **Required For**

Populates the Required For column with the organization and job that require a particular competence.

### **Person Competence Profile Worksheet**

This worksheet enables you to analyze people's competency profiles by type. It enables you to:

- View people with similar competencies.
- Compare people of similar grade.

### **Business Questions**

*How proficient is an individual for a particular competence?*

### **Related Topics**

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 3-131

### **Appraisal Detail Workbook**

This workbook provides the details of a range of appraisals, enabling you to view the participants, dates, and outcomes of multiple appraisals in one place. You can view all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

### **Worksheets**

This workbook contains two worksheets:

- Appraisal Detail by Organization Hierarchy
- Appraisal Detail by Supervisor Hierarchy

## **Appraisal Detail by Organization Hierarchy Worksheet**

This worksheet gives details of completed or ongoing appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, durations, and final ratings.

### **Business Question**

*What are the details of appraisals performed in my department?*

### **Parameters**

You must enter values for five parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organization
- Start Date
- End Date

## **Appraisal Detail by Supervisor Hierarchy Worksheet**

This worksheet gives details of completed or ongoing appraisals performed on workers under a specified supervisor. Data includes appraisee and appraiser names, dates, durations, and final ratings.

### **Business Question**

*What are the details of appraisals performed on my direct and indirect reports?*

### **Parameters**

You must enter values for three parameters:

- Supervisor
- Start Date
- End Date

## Competence Updates after Appraisal Workbook

The Competence Updates after Appraisal Workbook enables administrators and managers to view competence updates, both automatic and manual, made as a result of a completed appraisal. You can view competence updates for all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

### Worksheets

This workbook contains two worksheets:

- Competence Updates after Appraisal by Organization Hierarchy
- Competence Updates after Appraisal by Supervisor Hierarchy

### Competence Updates after Appraisal by Organization Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, competence names, and new and previous (if any) proficiency levels for each competence.

### Business Questions

*What competence updates have appraisees in my department received through appraisals?*

### Parameters

You must enter values for five parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organization
- Start Date
- End Date

### Competence Updates after Appraisal by Supervisor Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers under a specified supervisor.

## Business Questions

*What competence updates have my direct and indirect reports received through appraisals?*

## Parameters

You must enter values for three parameters:

- Supervisor
- Start Date
- End Date

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# Glossary

## **360-Degree Appraisal**

Part of the SSHR Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

## **Absence**

A period of time in which an employee performs no work for the assigned organization.

## **Absence Case**

Two or more absences for the same person that you associate manually because they share a common factor, such as the same underlying cause.

## **Absence Type**

Category of absence, such as medical leave or vacation leave, that you define for use in absence windows.

## **Accrual**

The recognized amount of leave credited to an employee which is accumulated for a particular period.

## **Accrual Band**

A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

## **Accrual Period**

The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

## **Accrual Plan**

See: *PTO Accrual Plan*, page Glossary-32

**Accrual Term**

The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

**Action**

In AME, an Action is the *Then* part of an Approval Rule that specifies how the application must progress a transaction's approval process in a particular way depending on the conditions met.

See: Approval Rule., page Glossary-5

**Action Type**

In AME, an action type is the generic container for specific actions. It enables you to specify the action to take if a transaction meets the condition of an approval rule. The action type, thus, generates the appropriate approvers for a transaction. As an AME administrator you can make particular action types available for specified transaction types. See: Transaction Types., page Glossary-41

**Active Employee**

DBI for HRMS counts an employee, page Glossary-17 as active if they have a current period of service, page Glossary-13 at the effective date, page Glossary-16

If an employee is suspended, DBI for HRMS still counts them as active.

DBI for HRMS also uses the term Incumbent to refer to an active employee.

**Active Contingent Worker**

DBI for HRMS counts a contingent worker, page Glossary-11 as active if they have a current period of placement , page Glossary-13 at the effective date, page Glossary-16.

If a contingent worker is suspended, DBI for HRMS still counts them as active. DBI for HRMS also uses the term Incumbent to refer to an active contingent worker.

**Activity Rate**

The monetary amount or percentage associated with an activity, such as \$12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

**Actual Premium**

The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

**Administrative Enrollment**

A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

**AdvancePay**

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

**Agency**

An external organization that assists an enterprise in their recruitment process. Agencies act on behalf of the candidates to help them search and apply for jobs. They provide candidates to the fill up job openings in an enterprise or sometimes handle the complete placement process for a vacancy.

**Agency Candidate**

An agency candidate is a person whose profile is created in iRecruitment by a recruiting agency. This profile includes personal and professional information.

**Agency User**

An external person who belongs to a recruiting agency and accesses iRecruitment to conduct recruiting activities such as creating candidates and applying on behalf of the candidates.

**Alert**

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

**Align**

To define a relationship between objectives. Workers can align their own objectives with objectives that other workers have shared with them. Aligned objectives are also known as *supporting objectives*.

**AME**

Oracle Approvals Management Engine. A highly extensible approvals rules engine that enables organizations implementing Oracle Applications to simply and effectively define business rules that determine who must approve a transaction originating within an application. You can devise simple or complex rules, as your organization requires, which then form part of your overall business flow. A central repository holds all the rules to facilitate management and sharing between business processes.

**API**

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

**Applicant**

An applicant is a person who submits an application for employment to an organization.

**Applicability**

In HRMS budgeting, a term describing whether a budget reallocation rule pertains to donors or receivers.

**Applicant/Candidate Matching Criteria**

Matching functionality in the iRecruitment system that systematically identifies which candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills
- FT/PT
- Contractor/Employee
- Work at Home
- Job Category
- Distance to Location
- Key Words
- Salary

**Apply for a Job**

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

**Appraisal**

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary-5.

**Appraisee**

The person who is the subject of an appraisal.

**Appraiser**

A person, usually a manager, who appraises an employee.

**Appraising Manager**

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

**Approval Rule**

In AME, a business rule that determines a transaction's approval process. You construct rules using *conditions* and *actions*. For example, you can write a business rule with the conditions that if the total cost of a transaction is less than 1000 USD, and the transaction is for travel expenses, then the action must be to obtain approval from the immediate supervisor of the person triggering the transaction.

See also Conditions, page Glossary-11, Actions, page Glossary-2.

**Approver Groups**

In AME, an approver group is a collection of approvers you define, which you can include as part of actions when you set up your approval rules.

**Arrestment**

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order* , page Glossary-12

**Assessment**

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary-4.

**Assignment**

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

**Assignment Number**

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

**Assignment Rate**

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of \$10.50.

**Assignment Set**

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-33

**Assignment Status**

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

**Attribute**

In AME, attributes are the business facts of a transaction, such as the total amount of a transaction, percentage of a discount, an item's category, or a person's salary and so on. These business variables form part of the conditions of an approval rule, and determine how the transaction must progress for approvals.

**Authoria**

A provider of health insurance and compensation information, that provides additional information about benefits choices.

**BACS**

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

**Balance Adjustment**

A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

**Balance Dimension**

The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

**Balance Feeds**

These are the input values of matching units of measure of any elements defined to feed the balance.

**Balances**

Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers.

See also: *Predefined Components* , page Glossary-31

**Bargaining Unit**

A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

**Base Summary**

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

**Beneficiary**

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

**Benefit**

Any part of an employee's remuneration package that is not pay. Vacation time, employer-paid medical insurance and stock options are all examples of benefits.

See also: *Elements*, page Glossary-16

**Block**

The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next.

See also: *Region*, page Glossary-34, *Field*, page Glossary-18

**Budget Measurement Type (BMT)**

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

**Budget Value**

In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

**Business Group**

The business group represents a country in which your enterprise operates. It enables

you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

### **Business Group Currency**

The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

### **Business Number (BN)**

In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

### **Business Rule**

See Configurable Business Rules, page Glossary-11

### **Cafeteria Benefits Plan**

See: *Flexible Benefits Program*, page Glossary-19

### **Calendar Exceptions**

If you are using the Statutory Absence Payments (UK) feature, you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

### **Calendars**

In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

### **Canada/Quebec Pension Plan (CPP/QPP) Contributions**

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

### **Candidate**

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

### **Candidate Offers**

An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

**Career Path**

This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

**Carry Over**

The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost.

See also: *Residual*, page Glossary-35

**Cascade**

A process managers at each level in a hierarchy use to allocate their own objectives to workers who report directly to them. This technique enables the allocation of enterprise objectives in some form to all workers.

**Cash Analysis**

A specification of the different currency denominations required for paying your employees in cash. Union contracts may require you to follow certain cash analysis rules.

**Ceiling**

The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

**Certification**

Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

**Chief HR Officer**

In DBI for HRMS the Chief HR Officer is the chief executive of the enterprise who can view the HR data at an enterprise-level.

**Child/Family Support Payments**

In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

**Collective Agreement**

A collective agreement is a form of contract between an employer or employer

representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

### **Collective Agreement Grade**

Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

### **Communications**

Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

### **Compensation**

The pay you give to employees, including wages or salary, and bonuses.

See also: *Elements*, page Glossary-16

### **Compensation Category**

A group of compensation items. Compensation Categories determine the type of compensation that you award under a plan.

### **Compensation Object**

For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation objects include programs, plan types, plans, options, and combinations of these entities.

### **Competency**

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competency*, page Glossary-42

### **Competency Assessment Template**

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-27

### **Competency Evaluation**

A method used to measure an employees ability to do a defined job.

### **Competency Profile**

Where you record applicant and employee accomplishments, for example, proficiency in a competency.

**Competency Requirements**

Competencies required by an organization, job or position.

See also: *Competency*, page Glossary-10, *Core Competencies*, page Glossary-12

**Competency Type**

A group of related competencies.

**Condition**

In AME, a Condition is the *If* part of an Approval Rule that specifies the conditions a transaction must meet to trigger an approval action. A condition consists of an attribute, which is a business variable, and a set of attribute values that you can define. When a transaction meets the specified attribute values, then the application triggers the appropriate action.

See: Approval Rule., page Glossary-5

**Configurable Business Rule**

In HRMS position control and budgeting, predefined routines (also called process rules) that run when you apply an online transaction, and validate proposed changes to positions, budgets, or assignments. You set their default status level (typically Warning) to Warning, Ignore, or Error.

**Configurable Forms**

Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

**Consideration**

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

**Consolidation Set**

A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

**Contact**

A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

**Content**

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

**Contingent Worker**

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

**Contract**

A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

**Contribution**

An employer's or employee's monetary or other contribution to a benefits plan.

**Core Competencies**

Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals.

See also: *Competency*, page Glossary-10

**Costable Type**

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

**Costing**

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

**Court Order**

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

See also: *Arrestment*, page Glossary-5

**Credit**

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

### Criteria Salary Rate

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

### Current Period of Service

An employee's period of service is current if their most recent hire date is on or before the effective date, and either the employee does not have a termination date for their latest employment, or their termination date is later than the effective date.

The table below provides an example using an effective date of 12 October 2004:

Effective Date	Hire Date	Termination Date	Current Period of Service?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

**Note:** In Oracle HRMS an employee cannot transfer from one business group to another. To move from one business group to another, the business group they are leaving must terminate the employee, and the business group they are joining must re-hire the employee. Therefore the definition of period of service, above, does not take account of any service prior to the most recent business group transfer.

### Current Period of Placement

A contingent worker's period of placement, page Glossary-30 is current if their most recent placement start date is on or before the effective date, and either the contingent worker does not have a placement end date for their latest placement or their placement end date is later than the effective date.

Effective Date	Place Date	End Placement Date	Current Period of Placement?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No

Effective Date	Place Date	End Placement Date	Current Period of Placement?
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

### **Database Item**

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

### **Date Earned**

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

### **Date Paid**

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

### **Date To and Date From**

These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-14, *Effective Date*, page Glossary-16

### **DateTrack**

When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date.

See also: *Effective Date*, page Glossary-16

### **Default Postings**

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

### **Department**

In DBI for HRMS, the term Department has the same meaning as Organization.

### **Dependent**

In a benefit plan, a person with a proven relationship to the primary participant whom

the participant designates to receive coverage based on the terms of the plan.

### **Deployment**

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

See also: *Secondment*, page Glossary-37

### **Deployment Factors**

See: *Work Choices*, page Glossary-43

### **Deployment Proposal**

The entity that controls the permanent transfer or temporary secondment of an employee from a source business group to a destination business group. The HR Professional in the destination business group creates the deployment proposal using the Global Deployments function.

### **Derived Factor**

A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

### **Descriptive Flexfield**

A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also: *Key Flexfield*, page Glossary-23

### **Developer Descriptive Flexfield**

A flexfield defined by your localization team to meet the specific legislative and reporting needs of your country.

See also: *Extra Information Types*, page Glossary-18

### **Direct Deposit**

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

### **Discoverer Workbook**

A grouping of worksheets. Each worksheet is one report.

### **Discoverer Worksheet**

A single report within a workbook. A report displays the values of predefined criteria for analysis.

### **Distribution**

Monetary payments made from, or hours off from work as allowed by, a compensation

or benefits plan.

### **Download**

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

### **Effective Date**

The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window.

See also: *DateTrack*, page Glossary-14

### **EIT**

See: *Extra Information Type*, page Glossary-18

### **Electability**

The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

### **Element Classifications**

These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

### **Element Entry**

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

See also: *Recurring Elements*, page Glossary-34, *Nonrecurring Elements*, page Glossary-26

### **Element Link**

The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element.

See also: *Standard Link*, page Glossary-39

### **Elements**

Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

**Element Set**

A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

**Eligibility**

The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

**Eligibility Profile**

A set of eligibility criteria grouped together. Eligibility profiles help determine eligibility for compensation and benefits and are re-usable. Eligibility profiles can be linked to a compensation object (such as a program, plan, or option), a collective agreement, a grade ladder, or a work schedule to restrict eligibility for these.

**Employee**

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employees have a system person type of Employee and one or more assignments with an assignment type of Employee.

**Employee Histories**

An SSHR function for an employee to view their Learning History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

**Employment Category**

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

**Employment Equity Occupational Groups (EEOG)**

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

**Employment Insurance (EI)**

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

**End Placement Date**

DBI for HRMS uses this term to specifically refer to the contingent worker's most recent placement end date prior to the effective date.

**Employment Insurance Rate**

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

**Enrollment Action Type**

Any action required to complete enrollment or de-enrollment in a benefit.

**Entitlement**

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

**ESS**

Employee Self Service. A predefined SSHR responsibility.

**Event**

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

**Ex-Applicant**

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

**Expected Week of Childbirth (EWC)**

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay (SMP).

**Extra Information Type (EIT)**

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-15

**Field**

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-7, *Region*, page Glossary-34

**Flex Credit**

A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

**Flexible Benefits Program**

A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

**Flexible Spending Account**

(FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use-it-or-lose-it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

**Form**

A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

See also: *Block*, page Glossary-7, *Region*, page Glossary-34, *Field*, page Glossary-18

**Format Mask**

A definition of a person-name format. The format mask comprises standard name components, such as title, first name, and last name, in an order appropriate to its purpose and legislation.

**Format Type**

A format-mask classification that identifies the mask's purpose. Oracle HRMS defines the Full Name, Display Name, List Name, and Order Name format types. You can also define your own format types for use in custom code.

**Full Time Equivalent (FTE)**

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

**Global Value**

A value you define for any formula to use. Global values can be dates, numbers or text.

**Goods or Service Type**

A list of goods or services a benefit plan sponsor has approved for reimbursement.

**Grade**

A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

**Grade Comparatio**

A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

**Grade Ladder**

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

**Grade Rate**

A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

**Grade Scale**

A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required.

See also: *Pay Scale*, page Glossary-29

**Grade Step**

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-20

**Grandfathered**

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

**Group**

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

**Group Certificate**

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

**Headcount(HEAD)**

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

**HR Staff**

In DBI for HRMS the HR Staff are people who work in the Human Resources role. Chief HR Officers can track the ratio of HR professionals to the number of workers in their enterprise.

DBI for HRMS uses the HRI\_MAP\_JOB\_JOB\_ROLE formula to categorize workers into HR staff and non-HR staff.

**Headcount Activity**

DBI for HRMS uses this term to mean all the gains and losses occurring in a manager's hierarchy during a reporting period.

**Hierarchy**

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

**High Availability**

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

**Hire Date**

In DBI for HRMS Hire Date is the employee's most recent hire date.

**Imputed Income**

Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

**Incumbent**

See also: *Active Employee*, page Glossary-2

**Individual Compensation Distribution**

A tool that enables managers assign one-time or recurring awards, bonuses, and allowances to qualified employees such as housing allowances, spot bonuses, and company cars. Also enables employees to enter voluntary contributions, such as savings

plans, charitable organizations, and company perquisites.

### **Info Online**

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, Metalink and Learning Management.

### **Initiator**

In SSHR a person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

### **Input Values**

Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

### **Instructions**

An SSHR user assistance component displayed on a web page to describe page functionality.

### **Integrating Application**

In AME, an application that uses Oracle Approvals Management Engine to manage the approval processes of its transactions.

See: Oracle Approvals Management Engine (AME), page Glossary-3

### **Integrator**

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

### **Interface**

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

### **Involuntary**

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

### **Job**

A job is a generic role within a business group, which is independent of any single organization. For example, the jobs "Manager" and "Consultant" can occur in many organizations.

**Job Posting**

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

**Key Flexfield**

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also: *Descriptive Flexfield*, page Glossary-15

**Key Performance Indicator (KPI)**

Target values that you set for the performance of your enterprise. This value comes from the corresponding KPI Portlet/Report. You can configure the Performance Management Framework to send a notification when actual performance falls short of, or exceeds, the target value. For example, you may configure the Performance Management Framework to send you a notification when workforce variance is greater than 10 percent, or when training success is below 50 percent.

**Key Performance Indicator (KPI) Portlet/Report**

Displays the executive summary of key measures such as total headcount and total salary.

**Layout**

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

**Learning Management**

Oracle's enterprise learning management system that administers online and offline educational content.

**Leave Loading**

In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

**Leaver's Statement**

In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

**Legal Employer**

A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

**Legal Entity**

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer.

**Life Event**

A significant change in a person's life that results in a change in eligibility or ineligibility for a benefit.

**Life Event Collision**

A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

**Life Event Enrollment**

A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

**Linked PIWs**

In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

**Linking Interval**

In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

**LMSS**

Line Manager Self Service. A predefined SSHR responsibility.

**Long Service Leave**

Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

**Lookup Types**

Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

**Lower Earnings Limit (LEL)**

In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

**Manager**

(iRecruitment) A manager accesses the iRecruitment system to document their hiring needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

DBI for HRMS counts a person as a manager if they supervise assignments (directly or through subordinates) for which the total headcount value is greater than zero at the effective date.

**Manager-Employee Appraisal**

Part of the SSHR Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

**Mapping**

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

**Maternity Pay Period**

In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

**Medicare Levy**

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

**Menus**

You set up your own navigation menus, to suit the needs of different users.

**My Account**

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

**NACHA**

National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

**National Identifier**

This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

**National Occupational Classification (NOC) code**

In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

**Net Accrual Calculation**

The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

**Net Entitlement**

The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

**Nonrecurring Elements**

Elements that process for one payroll period only unless you make a new entry for an employee.

See also: *Recurring Elements*, page Glossary-34

**North American Industrial Classification (NAIC) code**

The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

**Not in Program Plan**

A benefit plan that you define outside of a program.

**Objective Assessment Template**

The entity that configures the Objectives section of the appraisal.

See also: **Competency Assessment Template**, page Glossary-10

**Objectives Library**

A collection of reusable objectives. HR Professionals can either create individual objectives in the Objectives Library or import them from an external source.

**Off-Boarding**

Descriptive term covering all HR processes and procedures involved in removing a worker from your organization, including termination, relocation, and long-term sickness.

**OLM**

Oracle Learning Management.

**On-Boarding**

Descriptive term covering all HR processes and procedures involved in hiring and integrating a worker in your organization, including recruitment, hiring, and orientation.

**Online Analytical Processing (OLAP)**

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

**Online Transactional Processing (OLTP)**

The storage of data from day-to-day business transactions into the database that contains operational data.

**Open Enrollment**

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

**Options**

A level of coverage for a participant's election, such as Employee Only for a medical plan, or 2x Salary for a life insurance plan.

**Oracle FastFormula**

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

**Organization**

A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

**Organization Manager Hierarchy**

An HRMS structure that contains supervisors and subordinates on a reporting chain who also own organizations. HRMS uses this hierarchy to filter the information you display in report modules, such as the Daily Business Intelligence Workforce Budget Management dashboard, to include only managers who own organizations.

**OSSWA**

Oracle Self Service Web Applications.

**Outcome**

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

**Overrides**

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

**Parameter Portlet**

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

**Pattern**

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

**Pattern Time Units**

A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

**Pay Scale**

A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience.

See also: *Grade Scale*, page Glossary-20

**Pay Value**

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-22

**Payment Type**

There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

**Payroll**

A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

**Payroll Reversal**

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

**Payroll Rollback**

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

**Payroll Run**

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

**People List**

An SSHR line manager utility used to locate an employee.

**Performance Management Framework (PMF)**

A business intelligence tool used to alert users to exceptional circumstances, as defined

by KPIs. When a particular factor measured by HRMSi goes beyond a threshold chosen by the user, the system sends the user a workflow notification.

### **Performance Management Plan**

The entity that defines the performance-management process for a specified period. A component of the Workforce Performance Management function.

### **Performance Management Viewer (PMV)**

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

### **Period of Incapacity for Work (PIW)**

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

### **Period of Placement**

The period of time a contingent worker spends working for an enterprise. A contingent worker can have only one period of placement at a time; however, a contingent worker can have multiple assignments during a single period of placement.

### **Period Type**

A time division in a budgetary calendar, such as week, month, or quarter.

### **Personal Public Service Number (PPS)**

The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

### **Personal Tax Credits Return (TD1)**

A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

### **Person Search**

An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

### **Person Type**

There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

**Personal Scorecard**

A collection of objectives for a single worker arising from a single Performance Management Plan.

**Personnel Actions**

*Personnel actions* is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

**Plan Design**

The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

**Plan Sponsor**

The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

**Placement Start Date**

In DBI for HRMS Placement Date is the contingent worker's most recent start date prior to the effective date.

**Position**

A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

**Predefined Components**

Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

**Process Rule**

See Configurable Business Rules, page Glossary-11

**Professional Information**

An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

**Proficiency**

A worker's perceived level of expertise in a competency, in the opinion of an assessor, over a given period. For example, a worker may demonstrate the communication competency at Novice or Expert level.

**Progression Point**

A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale.

See also: *Pay Scale*, page Glossary-29

**Prospect Pool**

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

**Provincial/Territorial Employment Standards Acts**

In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

**Provincial Health Number**

In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

**PTO Accrual Plan**

A benefit in which employees enroll to entitle them to accrue and take paid time off (PTO). The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

**QPP**

(See Canada/Quebec Pension Plan)

**QA Organization**

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

**Qualification Type**

An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test.

See also: *Competence*, page Glossary-10

**Qualifications Framework**

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

**Qualifying Days**

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

**Qualifying Pattern**

See: *SSP Qualifying Pattern*, page Glossary-39

**Qualifying Week**

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

**Quebec Business Number**

In Canada, this is the employer's account number with the Ministère du Revenu du Québec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

**Questionnaire**

An SSHR function which records the results of an appraisal.

**QuickPaint Report**

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-6

**QuickPay**

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

**Ranking**

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

**Rates**

A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

**Rate By Criteria**

A function that enables the calculation of pay from different rates for each role a worker performs in a time period.

**Rating Scale**

Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level.

**Record of Employment (ROE)**

A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

**Recruitment Activity**

An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

**Recurring Elements**

Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links.

See also: *Nonrecurring Elements*, page Glossary-26, *Standard Link*, page Glossary-39

**Referenced Rule**

In HRMS budgeting, any predefined configurable business rule in the Assignment Modification, Position Modification, or Budget Preparation Categories you use as the basis for defining a new rule.

See Configurable Business Rules, page Glossary-11

**Region**

A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window.

See also: *Block*, page Glossary-7, *Field*, page Glossary-18

### **Registered Pension Plan (RPP)**

This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

### **Registered Retirement Savings Plan (RRSP)**

This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

### **Registered User**

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for jobs.

### **Reporting Group**

A collection of programs and plans that you group together for reporting purposes, such as for administrative use or to meet regulatory requirements.

### **Report Parameters**

Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

### **Report Set**

A group of reports and concurrent processes that you specify to run together.

### **Requisition**

The statement of a requirement for a vacancy or group of vacancies.

### **Request Groups**

A list of reports and processes that can be submitted by holders of a particular responsibility.

See also: *Responsibility*, page Glossary-35

### **Residual**

The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit.

See also: *Carry Over*, page Glossary-9

**Responsibility**

A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities.

See also: *Security Profile*, page Glossary-37, *User Profile Options*, page Glossary-42, *Request Groups*, page Glossary-35, *Security Groups*, page Glossary-35

**Resume**

A document that describes the experience and qualifications of a candidate.

**RetroPay**

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

**Retry**

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

**Revenue Canada**

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministère du Revenu du Québec.

**Reversal**

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

**Reviewer (SSHR)**

A person invited by an appraising manager to add review comments to an appraisal.

**RIA**

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

**Rollback**

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

**Rollup**

An aggregate of data that includes subsidiary totals.

**Run Item**

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

**Salary Basis**

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

**Salary Rate**

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

**Scheduled Enrollment**

A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

**Search by Date**

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

**Secondment**

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

**Security Group**

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-35, *Security Profile*, page Glossary-37, *User Profile Options*, page Glossary-42

**Security Groups Enabled**

Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

**Security Profile**

Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users'

responsibilities.

See also: *Responsibility*, page Glossary-35

### **Self Appraisal**

Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

### **Separation Category**

See also: *termination category*, page Glossary-41

### **Site Visitor**

(iRecruitment) A person who navigates to the iRecruitment web site and may view job postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

### **SMP**

See: *Statutory Maternity Pay*, page Glossary-39

### **Social Insurance Number (SIN)**

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

### **Source Deductions Return (TP 1015.3)**

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

### **Special Information Types**

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

### **Special Run**

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

### **SSHR**

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

## **SSP**

See: *Statutory Sick Pay*, page Glossary-39

### **SSP Qualifying Pattern**

In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

### **Standard HRMS Security**

The standard security model. Using this security model you must log on as a different user to see a different Business Group.

### **Standard Link**

Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link.

See also: *Element Link*, page Glossary-16, *Recurring Elements*, page Glossary-34

### **Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)**

A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

### **Statement of Earnings (SOE)**

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

### **Statement of Remuneration and Expenses (TD1X)**

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

### **Statutory Adoption Pay**

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

### **Statutory Maternity Pay**

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

**Statutory Sick Pay**

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

**Statutory Paternity Pay**

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

**Student Employee**

A student who is following a work-study program. Student employees have HRMS person records (of system type Employee) so that you can include them in your payroll.

**Succession Planning**

An SSHR function which enables a manager to prepare a succession plan.

**Suitability Matching**

An SSHR function which enables a manager to compare and rank a persons competencies.

**Superannuation Guarantee**

An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

**Supplier**

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

**Supporting Objective**

An objective aligned with another objective. Supporting objectives contribute to the achievement of the objectives they support.

**Tabbed Regions**

Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

**Task Flows**

A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task

flows to meet the needs of groups of users.

**Tax Point**

The date from which tax becomes payable.

**Template Letter**

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

**Terminating Employees**

You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

**Termination Category**

When employees leave an enterprise, the decision is either made by the employee or by the enterprise. When the decision is made by the employee the termination is Voluntary. When the decision is made by the enterprise, the termination is Involuntary.

DBI for HRMS uses a formula to determine which category each termination belongs to, based on the associated leaving reason.

HRMSi elsewhere refers to Termination Category as Separation Category.

**Termination Date**

DBI for HRMS uses this term to specifically refer to the employee's most recent termination date prior to the effective date.

**Termination Rule**

Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

**Tips**

An SSHR user assistance component that provides information about a field.

**Total Compensation Statement**

A module to communicate compensations, rewards, and benefits to employees and contingent workers.

**Transaction Type**

In AME, an integrating application may divide its transactions into several categories, where each category requires a distinct set of approval rules. Each set of rules is a transaction type. Different transaction types can use the same attribute name to

represent values that the application fetches from different places. This enables several transaction types to share approval rules, thus facilitating a uniform approval policy across multiple transaction types.

### **Transcensive**

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

### **Unit Standard**

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

### **Unit Standard Competency**

A competency that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

### **Upload**

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

### **User Assistance Components**

SSHR online help comprising tips and instructions.

### **User Balances**

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary-6

### **User Profile Options**

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-35, *Security Profile*, page Glossary-37

### **User-based Security**

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

**View**

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

**Viewer (SSHR)**

A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

**Viewer (Web ADI)**

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

**Voluntary**

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

**Waiting Days**

In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

**WCB Account Number**

In Canada, this is the account number of the provincially administered Workers' Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

**Work Choices**

Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

**Worker**

An employee, page Glossary-17 or a contingent worker, page Glossary-11

In DBI for HRMS workers are employees and contingent workers who report to the selected manager.

**Workers' Compensation Board**

In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the

employer. Workers' Compensation Board premiums are paid entirely by the employer.

**Workflow**

An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

**Workforce Measurement Type (WMT)**

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

**Workforce Measurement Value (WMV)**

A WMT value, for example, headcount or FTE.

**Workforce Performance Management**

The Oracle HRMS functions that support enterprise-directed objective setting, management, and assessment.

**Work Structures**

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

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