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Enterprise and Workforce Management Guide

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Primary Author: Gowri Arur

Contributing Author: Janet McCandless

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Oracle US Federal Human Resources Enterprise and Workforce Management Guide, Release 12.1

Part No. E13472-09

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle US Federal Human Resources Enterprise and Workforce Management Guide*.

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

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

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

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

See Related Information Sources on page xvi for more Oracle E-Business Suite product information.

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Structure

1 Introduction to Oracle US Federal HRMS
2 Organization Structure
3 Jobs and Positions
4 People Budgets and Costing
5 Person Types and Employment Groups
6 Employment Agreements and Legal Compliance
7 Checklists
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 E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent requests.

Guides Related to This Product

Oracle Daily Business Intelligence for HRMS User Guide

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

Oracle Daily Business Intelligence for HRMS Implementation Guide

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

Oracle Daily Business Intelligence Implementation Guide

This guide describes the common concepts for Daily Business Intelligence. It describes

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

Oracle Daily Business Intelligence User Guide

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

Oracle Application Framework Personalization Guide

Learn about the capabilities of the OA Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

Learn about extending and configuring Oracle HRMS, managing security, auditing,

information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Performance Management Implementation and User Guide

Learn how to set up and use performance management functions. This includes setting objectives, defining performance management plans, managing appraisals, and administering questionnaires.

Oracle Succession Planning Implementation and User Guide

Learn how to set up and use Succession Planning functions. This includes identifying succession-planning requirements, using talent profile, suitability analyzer, and performance matrices.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

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

Oracle iRecruitment Implementation and User Guide

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

needs.

Oracle Learning Management User Guide

Use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

Learn how to maintain employee labor distribution schedules, distribute pay amounts, encumber (commit) labor expenses, distribute labor costs, adjust posted labor distribution, route distribution adjustment for approval, and manage error recovery processes. You also learn how to set up effort reporting for Office of Management and Budget (OMB) compliance.

Other Implementation Documentation

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle E-Business Suite-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 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 E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite 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 My Oracle Support.

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 Oracle 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 E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

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

1

Introduction to Oracle US Federal HRMS

Introduction to Oracle HRMS

Oracle Human Resources Management System (HRMS) is a major component of the Oracle E-Business Suite of applications. Oracle HRMS is an integrated suite of applications that supports all aspects of the HR function. It includes:

- Oracle Human Resources (HR)
- Oracle Payroll
- Oracle Self-Service Human Resources (SSHR)
- Oracle Performance Management
- Oracle iRecruitment
- Oracle Time & Labor (OTL)
- Oracle Learning Management
- Oracle Advanced Benefits (OAB)
- Oracle HRMS Intelligence (HRMSi)

All Oracle HRMS applications share tables in the Oracle database, which eliminates data redundancy, reduces the possibility of error, and creates a consistent record of every worker. Within this framework, however, you can define a human resources model that supports your enterprise's structures and policies.

The Oracle HRMS applications meet the requirements of a global workforce. For example, HRMS enables you to manage information in a variety of national languages and supports multiple address styles, legislation-specific date formats, and national identifiers (such as social security numbers), which can be validated according to the

rules in each country.

Oracle Human Resources (HR) and Oracle Payroll

Oracle Human Resources (HR) enables the efficient management of workforce data and supports all standard HR activities, including workforce organization, development, and measurement. Payroll processing is a fundamental business requirement that demands accuracy, timeliness, and good financial controls. Oracle Payroll can help you ensure that all employees are paid on time and according to your compensation rules.

Oracle HR and Oracle Payroll constitute a closely integrated HR system. Oracle HR and Oracle Payroll windows are available under a single menu structure, sharing windows and underlying tables wherever possible to eliminate redundant data entry, maintenance, and storage.

Oracle Human Resources and Oracle Payroll are separately licensed products.

Oracle Self-Service Human Resources (SSHR)

Oracle Self-Service Human Resources (SSHR) enables your workforce to use a web browser to access HR information and perform personnel actions. The information an individual can access is tailored to the individual's roles and information needs. You can: authorize employees to maintain their own information, including personal profiles, benefits, and expenses; enable managers to conduct performance reviews, transfers, and time and expense approval; and deliver workforce intelligence to managers, HR professionals, and executives. Oracle SSHR is designed for the needs of the casual or untrained user, with simple, intuitive navigation and configurable user assistance integrated with the user interface.

Oracle SSHR is a separately licensed product. The self-service functions you can access depend on your licensing arrangements for other HRMS products. For example, you can use the self-service functions in Oracle Advanced Benefits only if you have licensed OAB.

See What is SSHR?, *Oracle SSHR Deploy Self-Service Capability Guide*

Oracle Performance Management

Oracle Performance Management is a self-service product that enables enterprises to implement an effective performance management system. It enables managers and employees to manage performance management functions including objectives setting and appraisals process. Enterprises can create and administer questionnaires for the various potential participants in the appraisal process.

Oracle Performance Management is a separately licensed product.

See: Oracle Performance Management Overview, *Oracle Performance Management Implementation and User Guide*

Oracle iRecruitment

Oracle iRecruitment is a self-service module that offers a fully automated recruitment process. It enables managers, recruiters, and candidates to manage all phases of recruitment, from vacancy definition through recruiting and hiring new employees. Oracle iRecruitment supports both internal and external users (such as visitors to recruitment sites) and is highly configurable to reflect the enterprise image. It can provide reports of your recruitment process, allowing you to monitor its effectiveness.

Oracle iRecruitment is a separately licensed product.

See iRecruitment Overview, *Oracle iRecruitment Implementation and User Guide*

Oracle Time & Labor (OTL)

Oracle Time & Labor (OTL) is a web-enabled time-recording application that enables you to reduce the costs associated with time and attendance record keeping. OTL ensures all employees are paid correctly and on time, it reduces administration costs by providing self-service time reporting for workers, and it shares worker time-related information with other Oracle applications, such as Oracle Projects and Oracle Payroll.

Oracle Time & Labor is a separately licensed product.

See Oracle Time & Labor Overview, *Oracle Time & Labor Implementation and User Guide*

Oracle Learning Management

Oracle Learning Management is an enterprise learning management system (LMS) that enables you to train your workforce effectively and at lower cost. Oracle Learning Management enables you to manage, deliver, and monitor your online and classroom-based training: you can efficiently assemble and deliver learning content; you can provide the most appropriate combination of classroom and online training; and you can measure the effectiveness of your training initiatives.

In Oracle Learning Management, self-service access is available not only to the learner but also to those responsible for administration and content management, offering improved efficiency and a lower cost of implementation for managing the learning environment.

Oracle Learning Management is a separately licensed product.

See Introduction to Oracle Learning Management, *Oracle Learning Management User Guide*

Oracle Advanced Benefits (OAB)

Oracle Advanced Benefits (OAB) is a benefits application that enables you to define and manage benefits programs in support of your enterprise's missions and objectives, while addressing the diverse and complex requirements of evolving benefits practices

and governmental regulations. OAB's web-based self-service functionality enables you to both improve service and reduce enrollment costs. You can easily create and modify eligibility rules and other criteria without customizing the application, and you can use advanced analytical tools to evaluate the effectiveness of your benefits programs.

Oracle Advanced Benefits is a separately licensed product. Your Oracle Human Resources license includes Standard Benefits, a more limited set of benefits administration features.

See Standard and Advanced Benefits Administration, *Oracle HRMS Compensation and Benefits Management Guide*

Oracle HRMS Intelligence (HRMSi)

The Oracle HRMS products together hold vast amounts of HR data that, intelligently organized and presented, can facilitate enterprise management and decision making. Oracle HRMS Intelligence (HRMSi) is a configurable analysis tool that provides structured and comprehensive access to your HR data. For example, HRMSi provides predefined reports that enable you to analyze budgets, view employee development and performance data, analyze salary trends, and monitor vacancies and recruitment. You can configure the predefined reports, and you can also define your own reports.

Using HRMSi's web-based interface, you can perform ad hoc queries of HR data, and you can reduce administrative costs by distributing reports using the same web-based interface. HRMSi also provides a performance management framework: you can define targets and receive alerts when workforce changes become critical.

Oracle HRMSi is a separately licensed product.

See Reports and Processes in Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Introduction to Oracle HRMS

Oracle Human Resource Management System (HRMS) enables you to achieve a well managed human resource system, turning HR management into a strategic advantage.

What is Human Resource Management?

Today, the most successful enterprises continuously review and improve their business functions, searching for new ways to streamline processes to make them more effective and to use them to gain competitive advantage. Human Resource Management is responsible for addressing the workforce aspect of this continuous improvement.

Why is Human Resource Management important?

The people within your enterprise produce the goods and provide the services that fuel your enterprise. At the same time, the human cost is often the biggest cost a company

incurs. Well managed human resources directly improve your enterprise and contribute to a competitive advantage.

If your enterprise has strategic, value added human resource management you will hire, motivate and retain the most capable workforce. You will have the ability to engage employees and line managers directly in managing their skills and careers to your enterprise's advantage. Furthermore, you will have accurate, up-to-date workforce information for managers and executives.

What applications comprise the Oracle HRMS family suite?

Oracle HRMS consists of the following applications. These are all separate products powerfully integrated into one application family.

- Oracle Human Resources
- Oracle Payroll
- Oracle Advanced Benefits
- Oracle Self-Service Human Resources (SSHR)

When the term *HRMS* is used, it refers to this integrated set of applications.

Applications Related to the Oracle HRMS family suite

There are other applications related to the Oracle HRMS family suite:

- Oracle Training Administration
- Application Data Exchange and Hierarchy Diagrammers
- Oracle Time Management
- Oracle Business Intelligence System

Individual user guides provide information on these other products.

What is Oracle Human Resources?

Oracle Human Resources (HR) is a proactive management solution that helps control costs while developing and supporting an effective workforce. Among the many features of Oracle HR is the ability to:

- Manage the entire recruitment cycle.
- Design organizational models that match current and future business strategies and objectives.
- Perform position management by defining and recording required skills,

competencies, experience and qualifications for positions, jobs and organizations.

- Perform career management functions relating to the definition of skills, assessments, suitability matching, graphical ranking and succession planning.
- Administer and maintain benefits plans, coverage levels and contribution allocations.
- Manage salary compensation.
- Use spreadsheets to export compensation and benefit details for comparison with external survey figures.

Oracle Human Resources provides the shortest route to fast, smart human resource management.

What is Human Resource Management in the Federal Sector?

In the federal sector, government and agency-specific regulations shape the ways in which employees work and receive compensation. Oracle Federal Human Resources is designed specifically for managing federal employees.

Using Oracle Federal Human Resources, you can process personnel actions with an electronic version of the Request for Personnel Action (RPA). The product supports the Office of Personnel Management (OPM) recommended Nature of Action Codes (NOACs) as well as the data, business rules, and edits required to complete personnel actions. You can create actions, route them using workflow technology for approval and authorization, execute the Central Personnel Data File (CPDF) edits prior to updating the human resources database, and generate the printed Notification of Personnel Action.

Using the supplied position description functionality, you can classify and certify positions, and generate position description cover sheets to accompany position actions. The position description library allows you to store position descriptions, performance standards, and position evaluations so that you can access common position description documents for similar positions.

Using the product's report functionality, you can submit OPM mandated reports such as the CPDF reports, AA/EEO Breakdown Report, EEOC Form 462 Report, and the Standard Form 113A report.

What applications make up the Oracle HRMS family suite?

Oracle HRMS consists of the following applications. These are all separate products, powerfully integrated into one application family.

- Oracle Human Resources (HR)

- Oracle Payroll
- Oracle Advanced Benefits (OAB)
- Oracle Self-Service Human Resources (SSHR)
- Oracle iRecruitment
- Oracle HRMS Intelligence (HRMSi)
- Oracle Learning Management
- Oracle Time & Labor (OTL)

When the term *HRMS* is used, it refers to this integrated set of applications.

What is Oracle Self-Service Human Resources (SSHR)

SSHR provides self-service human resource management for managers and employees. Using an intranet and a web browser, employees and their managers now have easy to use and intuitive access to personal data and career management functionality.

Oracle Workflow is used extensively in SSHR. SSHR uses Workflow to manage the flow of information between employees and management. The workflow engine is used for business process transactions and can route decision making through approval chains. For example, an employee may apply for a job using the Apply for a Job function, and through a management approvals process be informed and accepted into a job.

The workflow engine is also used to modify and configure much of SSHR.

Using SSHR you can:

- View employee or contingent worker information.

  Managers can review information about employment, salary, performance, training, absence, and job applications for each person within their security access. Employees and contingent workers can view only their own records.

- Manage careers.

  This includes appraising employee's competencies, matching a person to a job or position by competence, and planning succession.

- Perform web based recruitment using 'Candidate Offers'.

  Candidate offers enables you to perform web based recruitment. Managers can seek approval for an appointment, then advise job applicants, by letter, that they have been successful. This function is offered with its own responsibilities.

Is Oracle HRMS a Multilingual, Global Application?

Yes. Oracle HRMS offers the best of both worlds in the same installation. Oracle provides non-legislative information common across all countries, plus localized information specific to each country.

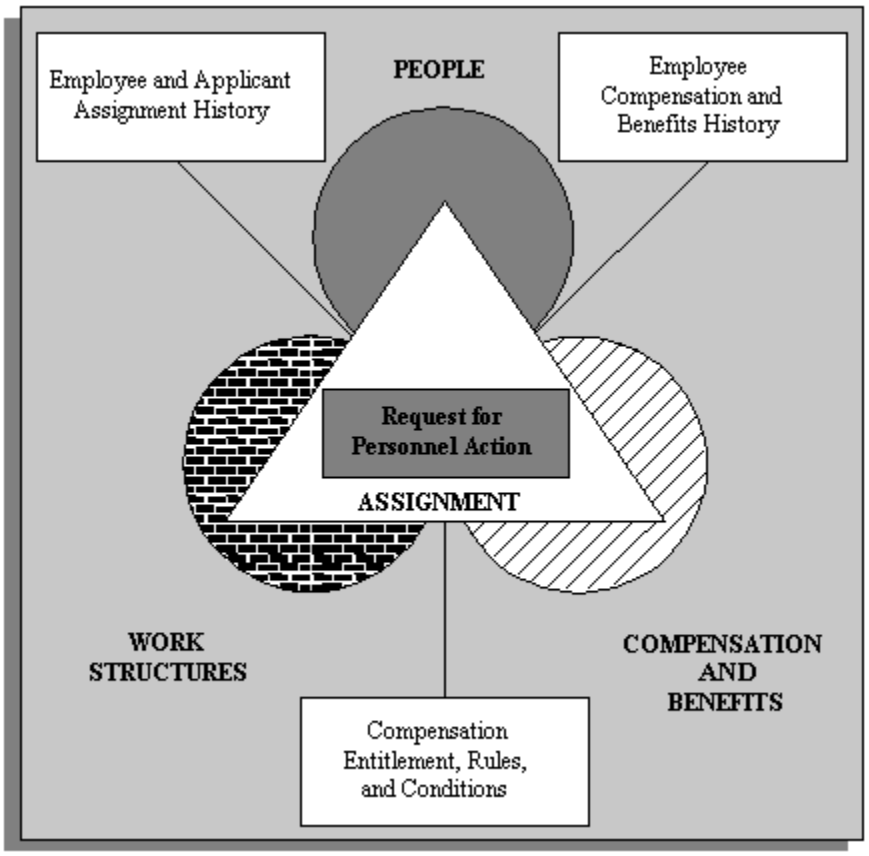
Oracle also enables you to run HRMS in more than one language on a single database. This enables you to enter and report on information using more than one language. For example, your base, or source language, could be French, but you could also install German and English. You would then be able to enter and produce reports in French, German and English.

Introduction to Oracle HRMS

Human Resource Model

The human resource model is both flexible and adaptable. It is flexible, so that you can reflect the needs of different agencies, or different groups within the same agency. It is adaptable, so that you can easily change the basic model as your agency changes.

Modelling Human Resource Information



People

In Oracle HRMS, you can hold information about current and former employees, applicants, contingent workers, and contacts such as relatives and dependents.

In addition to standard information such as addresses, nationality, interview records, qualifications, and absence information, you can define any other special information you need to hold for people. For example, you can define what information to hold on medical history, previous employment, or outside interests.

You can also record employment information. Employee assignments relate employees to the work structure of the enterprise.

In Oracle HRMS, you can hold information about current and former employees, applicants, external contacts such as contractors, and employee contacts such as relatives and dependents.

Work Structures

Compensation and Benefits

In Oracle HRMS you can define your own types of compensation and benefits, and the business rules you want to apply to them. As you change policies, move people within your enterprise, and adjust their individual remuneration packages, the system maintains their compensation and benefit history.

For example, suppose you want to define a special type of payment and make this available only to employees who work at a particular location. In Oracle HRMS you use a compensation *element* to represent the payment. You define the business rule as a *link* between the element and the specific location. Then when you assign employees to the location, they automatically become eligible for the payment.

Assignments

In Oracle HRMS, theassignment describes employees' and contingent workers' places within the enterprise: the organization for which they work, their role, grade, location, and so on. As you change the assignment information for an employee or contingent worker, you automatically build up their work history.

Your compensation eligibility rules link compensation and benefits to work structures, such as positions, grades and pay plans. The assignment places employees and contingent workers within the work structures of the enterprise. In this way, an employee's assignment determines his or her eligibility for compensation and benefits.

You can use assignments to identify major groups of people within the enterprise for management, for reporting and costing, and for compensation and benefit planning and administration.

Oracle Human Resources

For Oracle Human Resources, you enter and maintain fundamental human resource information about your structure and operations, your workforce and their assignments, and employee compensation and benefits. You then add the specialized information you need specifically for human resources or payroll management and administration.

Information in Oracle HRMS

The common core of fundamental information used by both human resources and payroll managers and staff includes:

- Your operational basics:
  - Payrolls with their calendars and pay periods
  - Currencies and methods of payment you use
- Your organizational structure:
  - Internal organizations, such as departments
  - External organizations of key importance to you, such as benefit carriers
  - Organization location information, including addresses and telephone numbers
  - Hierarchies showing the relationships between your organizations
- Your workforce essential personal information, such as:
  - Name and address
  - Marital status
  - Social security number
  - Birth date
- Your workforce current work statuses, such as:
  - Active Appointment
  - Furlough NTE
  - Promotion NTE
  - Separated
- Your employees' assignments to:
  - Internal organizations
  - Positions
  - Valid grades and pay plans

    - Groups having a compensation-related factor in common, such as membership in a pension plan
    - Government reporting entity (GRE)
    - Locations with corresponding Duty Stations
    - Payrolls
- Your contingent workers' assignments to:
    - Supervisory details
    - Assignment rate types and assignment rates
    - Supplier details
- Elements of your employees' pay and benefits:
    - *Earnings* such as Basic Pay, Other Pay, bonuses
    - *Employer charges* such as employer contributions to legislatively-mandated or private insurance or pension plans
    - *Deductions* such as contributions for union dues
    - *Nonpayment benefits* such as vacation time or a government car
    - Other benefits such as Thrift Savings

Shared Windows in Oracle HRMS

While many of the windows in your system relate exclusively to the human resources or payroll function, some include information relevant to both functions. These latter windows are *shared* windows.

Shared windows can include some information fields relevant to both human resources and payroll users, and other fields for information specific to either human resources or payroll users but not both.

Using Shared Windows

You can control the use of fields on shared windows by the value your system administrator gives to each user or responsibility for the HR:User Type profile option. The three valid values are:

- HR with Payroll User

- HR User
- Payroll User

Users with an *HR User* profile

These are restricted in their use of fields on certain windows. In particular they:

- Do not see certain fields on the Element window, which are only required if you are processing elements
- Cannot assign employees to a payroll if both Oracle Payroll and Oracle Human Resources are installed

Also, in all legislations, apart from the US, they:

- Do not see the Statutory Information field in the Payroll window
- Cannot adjust element entry Pay Values

How to Use Your Documentation and Online Help

The Oracle HRMS online help is organized in the navigation tree by functional groups, such as enterprise and workforce management, payroll, and talent management. The Oracle HRMS guides mirror this organization. A summary of the contents of each Oracle HRMS guide appears below.

Oracle HRMS Implementation Guide

The *Oracle HRMS Implementation Guide* identifies tasks you need to perform after installing the HRMS applications and before making them generally available to your users. It includes:

- Descriptions of post-installation utilities
- A general implementation checklist to help you identify the Oracle HRMS functions you want to implement
- Implementation flowcharts to guide you through the implementation of all major functional areas
- Technical essays that explain some fundamental aspects of Oracle HRMS

Oracle HRMS Configuring, Reporting, and System Administration Guide

The *Oracle HRMS Configuring, Reporting, and System Administration Guide* describes how to configure the application to meet your requirements. Tasks it addresses include:

- Controlling user access to data and functions
- Auditing changes to Oracle HR data
- Downloading Oracle HR data to generated Microsoft Excel or Word documents on the desktop using Web ADI
- Generating letters
- Adding fields to windows and defining additional information for existing fields
- Setting up user tables and lookups
- Extending user types and statuses
- Using and configuring predefined alerts
- Customizing form processing using custom code
- Enabling context-sensitive links to web pages and information provider web sites
- Defining task flows by linking windows in an appropriate order
- Using the People Management Configurator to design windows
- Defining different versions of windows using CustomForm

Oracle HRMS Enterprise and Workforce Management Guide

The *Oracle HRMS Enterprise and Workforce Management Guide* describes how to define and manage the infrastructure of your enterprise in Oracle HR. Tasks it addresses include:

- Defining and classifying organizations
- Defining locations
- Enabling the automatic creation of HR organizations
- Defining and managing jobs and positions
- Defining and managing hierarchies of organizations and positions
- Posting and routing transactions
- Reorganizing the workforce
- Estimating and managing HR budgets

- Defining and managing people types and employment groups
- Setting up employment agreements and complying with legal requirements

Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide

The *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* describes all aspects of workforce management and development in Oracle HR. Tasks it addresses include:

- Recording and maintaining personal information about employees, applicants, contingent workers, and contacts
- Appointing employees with Requests for Personnel Action and processing subsequent actions for them
- Processing mass actions for groups of employees
- Setting up self-service information for individuals
- Terminating employment and placements
- Reporting on the workforce
- Defining and measuring workforce competencies and qualifications
- Planning careers and succession
- Matching workers to opportunities
- Evaluating and appraising the workforce

Workforce Management

Oracle HRMS provides you with an easy, efficient and flexible workforce management system that enables you to organize your workforce exactly as you want.

You can hold a wide range of personal information, such as medical details, work schedules and preferred language for correspondence, as well as the basics such as date of birth, identification number and addresses. You can also enter personal contacts, including dependants and beneficiaries and inquire and report on people held on the system.

You also need to record and manage how people work for your agency. Using functionality in the product such as the Request for Personnel Action, you can associate the employee to the agency's work structure and compensations and benefits policies.

Oracle HRMS Compensation and Benefits Management Guide

The *Oracle HRMS Compensation and Benefits Management Guide* describes all aspects of compensation management in a modern enterprise. It supports both Standard Benefits (included in Oracle HR) and Oracle Advanced Benefits (OAB). Tasks it addresses include:

- Processing Within Grade Increases and quality step increases
- Processing compensation and award RPA actions
- Processing mass salary and other pay adjustment actions
- Managing US Federal benefit programs such as Thrift Savings Plan and Federal Employee Health Benefits
- Reporting on compensation and benefits in the enterprise
- Managing leave and other types of absence

Oracle HRMS FastFormula User Guide

Oracle FastFormula is a simple way to write formulas using English words and basic mathematical functions. Oracle FastFormula performs calculations or comparisons on data taken from a window, a database, or a process, and returns values or messages. The *Oracle HRMS Fast Formula User Guide* describes:

- Techniques for writing formulas
- The supplied sample formulas
- How to write formulas for specific purposes

Oracle HRMS Deploy Self-Service Capability Guide

Oracle Self-Service Human Resources (Oracle SSHR) enables workers and managers to participate in HR activities using a web browser. Oracle SSHR has simple, intuitive navigation and configurable user assistance integrated with the user interface. The *Oracle HRMS Deploy Self-Service Capability Guide* describes how to implement, extend, and manage Oracle SSHR. Tasks it addresses include:

- Setting up SSHR
- Using generic and function-specific configuration options
- Controlling user access to data and functions

- Using the supplied workflows and configuring them using Workflow Builder
- Personalizing the SSHR page layouts
- Implementing approval mechanisms for transactions carried out by SSHR users
- Using SSHR for all HR tasks

Oracle HRMS iRecruitment Implementation Guide

Oracle iRecruitment is an online recruitment system that enables you to manage all recruitment activities using a single self-service interface. The *Oracle HRMS iRecruitment Implementation Guide* describes how to implement and manage Oracle iRecruitment. Tasks it addresses include:

- Setting up Oracle iRecruitment
- Using configuration options
- Controlling user access to data and functions
- Personalizing page layouts
- iRecruitment functions
- Extending iRecruitment
- Reporting on the recruitment process

Oracle HRMS Deploy Strategic Reporting (HRMSi) and Strategic Reporting (HRMSi) User Guide

Oracle HRMSi provides a web-enabled suite of strategic reports that provide summaries and details of HRMS application data. It also provides the tools to enable you to create your own reports.

Oracle HRMS Deploy Strategic Reporting (HRMSi) provides instructions and checklists for implementing the HRMSi modules:

- Discoverer Workbooks and End User Layer (EUL)
- Discoverer Analytics Reports (for business analysts)
- Performance Management Framework (for assessing enterprise performance using Key Performance Indicators (KPIs)
- Data Warehouse

- HTML Reports
- Daily Business Intelligence for HRMS

The *Strategic Reporting (HRMSi) User Guide* explains how the information in each type of report is derived, identifies the types of business questions the reports can address, and describes report parameters. It is organized by functional area, such as Leave and Absence Management, Recruiting and Hiring, and Learning Management.

Multilingual Oracle HRMS

Oracle HRMS enables you to manage information in a wide variety of languages. To help you enter and retrieve information in the language of your choice, HRMS provides you with the following features.

Multiple Addresses Styles

Every country has its own address style, for example in Italy you can enter the province and in Malaysia you can enter the region. Oracle HRMS enables you to select the correct country address style.

See: Changing Default National Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

National Identifiers

Each country has its own method of identifying its citizens. For example, in the UK it is the National Insurance number, in the US it is the Social Security number, and in Canada it is the Social Insurance number.

For supported localizations you can select the correct national identifier for your site and then check on entry that identifiers have the correct national format. For example, in the UK the format is 'AADDDDDDA', where A is a letter and D is a digit, while in Canada it is DDD DDD DDD.

If your localization is not supported, you can define your own validation.

Dates and Numbers

Oracle HRMS enables you to enter dates and numbers in any format and then translates this into the national format supported by your legislation. For example, you do not have to enter a date in a prescribed format such as DD/MM/YYYY. You can enter the date how you want, and HRMS automatically configures it in the national format defined for your site.

Similarly, you do not have to enter numerical information in a prescribed format. For example, US usage has previously required the format 1,000.0 whereas German usage has required the format 1.000,00. You can now enter the number without explicit formatting, as the correct format for your site will be automatically configured.

Translating Information

Oracle HRMS enables you to install additional languages on top of your base or source language. You can then enter information in key fields in your additional languages using the Translations window. This is accessed by choosing the Translation icon on the toolbar, or by choosing the View > Translations menu option. The translated information you enter is then used if you print reports or log on to Oracle HRMS in this language.

HRMS windows where the Translation icon is available are:

- Organization
- Location
- Person Types
- Assignment Statuses
- Element
- Input Values
- Balance
- Organizational Payment Method
- Element Classifications
- Absence Attendance Type

See: Creating Translations for a Record, *Oracle E-Business Suite User's Guide*

The following fields are also translatable, and the Translation icon appears in windows where you can update these fields:

- Competence aliases, descriptions and behavioral indicators
- Rating scale names and descriptions
- Rating level names and behavioral indicators
- Qualification details
- Position posting descriptions, security requirements, and amendment information

The following fields are partially translatable:

- Job names

- Grade names
- Competence names
- Position names

Only those parts of the key flexfield name that are derived from value sets appear in translation, using the translated values for the value sets. Value sets can be translated using the Translations window.

> **Note:** The translation of the value set must be available before the flexfield is created, otherwise the translation does not appear in the field name.

Multilingual Reports

Oracle HRMS enables you to print HRMS reports in the languages of your choice. Depending on the type of report, Oracle HRMS either:

- Enables you to select the language in which to print the report
- Prints the report in the language, or set of languages, depending on the report parameters you select

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

Managing Change Over Time

A key requirement for any agency is the ability to manage change confidently and effectively. In Oracle HRMS, you can change each of the major parts of your agency model without having to redefine the other parts.

To manage the changes to your enterprise, information within your enterprise is either *dated* or *datetracked*.

Dated Information

Work structures are an example of information that is dated. You can attach dates to your work structures to manage different versions over time. You retain previous versions for historical information and you can create future-dated versions to prepare for reorganization in advance.

You can also set up in advance the business rules, including compensation and benefits, associated with the new structures. These become effective on the date you specify, avoiding a workload peak.

The information about your locations, organizations, jobs, positions, grades, pay tables,

and other work structures is *dated* information. All dated information has *From* and *To* dates, that is, dates from and to which it is in effect in your organization. For example, when defining a position, you enter a date from which it starts. To close it down, you give it a date to which it remains valid.

Oracle HR does not permit you to assign your workers to structures on dates earlier than their Date From, or later than their Date To. Similarly, the system protects you from building eligibility rules for compensation and benefits based on work structures that have not yet gone into effect, or are out of date.

Consider using a fixed date, such as 01-JAN-1901 as the start date for all your initial work structures. By choosing a date like this you can immediately identify all of your implementation definitions. You should use accurate dates for all subsequent definitions.

Dated Versions of Hierarchies

You can structure the organizations and positions you enter in Oracle HRMS into organization or position *hierarchies* that serve various purposes. Reporting hierarchies, for example, reflect reporting lines within your enterprise.

You maintain both dates and version numbers for these hierarchies, to keep a history of your hierarchies as they change over time.

To build a new version of a hierarchy, you can copy an existing one and make the necessary changes to it. When you save the new version the system automatically gives the previous version an end date.

DateTrack

In contrast to work structures, which are simply dated, other key dynamic information in Oracle HRMS is *datetracked.* This includes information on employees, assignments, and compensation and benefits. DateTrack allows you to maintain a continuous history of the information over time.

When reviewing, entering, changing or deleting datetracked data, you can set an effective date in the past or future. The system uses only information in effect *as of that date* for whatever you do.

When you make a change, you can choose whether it is a correction to the last update or a new update to be recorded in the history of the record. You can use DateTrack History to view a report of every update ever made to a record. When you enter information in the Extra Information for Assignment, Position, and Person, the information is always a new update. The DateTrack History report does not show a history of changes you've made to the information stored in these flexfields.

You can enter datetracked information or make changes to it at any time. When you set an effective date for your work, DateTrack ensures that only information effective *on that day* is used for any processing, validation, and reporting you carry out.

Dated Information and Time Zones

Oracle HRMS stores the dates associated with dated information in the time zone of the end user, irrespective of the server's location.

For example, say an end user in New Zealand, where the time is Thursday 09 MAY 2002 06:02:19, enters a *From* date of 09-MAY-2002. The database located in San Francisco USA, where the time is WED-08-MAY-2002 11:02:19, will store 09-MAY-2002, as entered by the user, irrespective of the server's time zone.

When a user in any location views the dates associated with dated information they will always see the date as entered by the user, irrespective of their time zone or the server's time zone.

Effective Date Reminder

When you are new to DateTrack, you may find it useful to be reminded of your effective date whenever you open a window that contains datetracked information. The reminder appears in a Decision window and asks whether you want to change your effective date. If you choose Yes, the Alter Effective Date window displays.

There is a user profile option called DateTrack:Reminder that determines when the Decision window appears. There are three possible values for this profile option:

- Always
- Never
- Not Today

The Not Today value causes the reminder to appear when you navigate to a window where you can change datetracked information and your effective date is not today's date.

You can set the value of this profile option in the Personal Profile Values window.

Datetracked Information and History

Oracle HRMS maintains a continuous record of changes made to datetracked information. When you view a record in a datetracked window, it shows you a snapshot of the information on your effective date. The Effective Dates region on the datetracked window shows you the dates between which the snapshot is valid.

Suppose you are viewing an assignment with an effective start date of 01-JAN-1999 and no effective end date. This means that the assignment was created or last changed on 1 January 1999, and the snapshot information you are viewing is still valid. There have been no changes to the assignment since 1 January 1999, and there are no future dated changes.

To find out whether the assignment existed before 1 January 1999, you should use DateTrack History.

If there is an effective end date, you know that the record was either deleted or changed on the next day. To find out whether the record continues to exist, you can set your effective date to the day after this end date, or use DateTrack History.

When you update datetracked information, you are prompted to choose between Update and Correction.

If you choose Update, Oracle HRMS changes the record as from your effective date, but preserves the previous information. If you choose Correction, Oracle HRMS overrides the previous information with your new changes. The start and end dates of the snapshot you have corrected remain the same.

Example of Correction versus Update

Suppose you hire two new employees, Jack Lee and Julie Summers. A few weeks later Julie gets married. At the same time you discover an error in Jack's record relating to his address.

You *update* Julie's information by setting your effective date to the date of her wedding and entering her new married status and new next of kin information. Her previous personal information, which was valid until her wedding, remains in her record.

You *correct* Jack's wrong address by setting your effective date to his hire date and entering the correct address. By choosing Correction, you put the record right, from the beginning. You should check whether there is an end date in the Effective Dates region of Jack's record. If there is, you have only corrected the first snapshot of the record. Set your effective date to the day after the end date, and make the correction again. Continue in this way until the To field is blank, indicating that you have reached the last snapshot of this record.

New Records

You cannot create a record and then update it on the same day. If you try to do this, Oracle HR warns you that the old record will be overridden, and then changes Update to Correction. This is because DateTrack maintains records for a minimum of a day at a time.

Future Updates

Using DateTrack, you can make future updates. For example, suppose an employee is moving with one week's notice. You decide to enter the new address on the system right away. On the Request for Personnel Action, you set your effective date to the first day when the employee will be at the new address and change the address.

Later that month you promote the employee to a new position. On the Request for Personnel Action (RPA), you set your effective date to today's date and change the position. Because the system applies all updates that have been approved and are effective for that date, the employee's new address appears on the RPA.

DateTrack Date Security

There is a **DateTrack:Date Security** user profile option, which determines whether you

can change your effective date. Your system administrator sets this profile option. You can check its value on the Personal Profile Values window. There are four possible values:

- *All:* You can change to any other effective date.
- *Future:* You can change between today's date and any future dates.
- *Past:* You can change between today's date and any past dates.
- *Present:* You cannot change to a date other than today.

DateTrack Deleting Options

When you delete datetracked information, Oracle HRMS prompts you with the following options:

End Date: This ends the record on your effective date. When you re-query the record, this end date displays in the To field.

Purge: This totally removes the record from your database.

If there are any future updates to the record after your effective date, Oracle HRMS may prompt you with another two options:

All: This removes all future updates to the record. The current snapshot is valid until you make another change.

Next: This removes the next future update to the record. It then resets the current snapshot's end date to the end date of the deleted update.

You do not always see all of these options when you choose to delete. Some windows do not allow all four operations.

Setting Your Effective Date

When you log on to Oracle HRMS, your effective date is always the current date.

> **Note:** If you set the profile option DateTrack:Login Date with a value the effective date will default to this date instead of the current date.

To view information current at another date, or to make retrospective or future-dated changes, you need to change your effective date.

To set your effective date:

1. Save any outstanding information you have entered or changed, then choose Alter Effective Date from the Tools menu.

   The Alter Effective Date window opens.

2. Enter a new effective date and choose OK.

   If your current window is a "top-level" window (one called directly from the Navigator), your new effective date remains in place until you reset it or exit Oracle HRMS. If your current window is not a top-level window, your new effective date only applies while you are working in the current window and any windows subsidiary to it. When you return to a top-level window, your effective date is reset to its previous value.

   > **Note:** In certain special cases, when you change your effective date on a subsidiary window, Oracle HRMS returns you to the previous window, and you may have to re-query the records you want to view or update. This protects the integrity of these records.

   So long as your effective date remains different from the server date, it is displayed in the title bar of every window.

Removing an End Date

If you have mistakenly set an end date on a datetracked record, you can remove it.

To remove an end date:

1. Set your effective date to the day the record ends.
2. Choose Delete Record from the Edit menu.
3. Choose the DateTrack delete option Next. This removes the next change to the record, which is the end date. Save your work.

Viewing the History of Datetracked Information

To see all the changes made to a datetracked record over time, use DateTrack History.

> **Note:** In the second window of the DateTrack History window the From Date and To Date values are *not* queried directly from the Effective date fields. They are derived values, based on the other displayed columns in the Full History window. Where the other displayed columns values are the same between adjacent database rows then they are merged together into one displayed row. This feature enables you to see the data values for the fields you are interested in and when they have actually changed. The displayed rows are recalculated when the list of fields to be displayed is changed.

To view DateTrack History:

1. Choose the DateTrack History icon from the Toolbar.

   The DateTrack History Change Field Summary window opens. Each row shows which fields were changed on the From date.

2. Choose the Full History button if you want to open a DateTrack History folder showing the value of each field between the effective dates. The row for the current snapshot (corresponding to your effective date) is highlighted.

   You can use the Folder menu to select the fields to view in the folder.

   > **Note:** It is possible to customize the information displayed in the Folder by modifying the DateTrack History view for the underlying table.

   See: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

2

Organization Structure

Organization Structures Overview

Oracle HRMS provides you with organization management functionality to represent your agency and all the departments and sections below this level, using:

- Site locations
- Business Groups
- Organizations
- Organization hierarchies
- Cost Centers

Locations and Duty Stations

In Oracle HRMS, you set up each physical site where your employees work as a separate *location*. Similarly, you enter the addresses of external organizations that you want to maintain in your system, such as employment agencies, tax authorities, and benefits carriers. The location of an employee's position or Duty Station determines that person's Locality Pay. As a result, each location associated with a position's organization has an associated Duty Station. When you create a Location, you enter the Duty Station information as part of the Location Extra Information.

See: Locations, page 2-62

Representing Structures Using Oracle HRMS

Using Business Groups, you can represent the largest organizational unit. When you set up business groups, you can enter defaults for information that will generally apply to all employees in the business group, such as the default working hours for all

employees.

Using Organizations, you can represent all the levels within the agency, including internal organizations, such as divisions, bureaus, and branches, and external organizations, such as training vendors.

See: HRMS Workbench Organization Structures, page 2-5

See: Representing Organizations, page 2-5

Organization Hierarchies

By building organization hierarchies, you can show reporting lines and other hierarchical relationships among organization in your enterprise. You can set up as many hierarchies as you need. For example, you might set up hierarchies for matrix management, security hierarchies or hierarchies for reporting.

See: Organization Hierarchies, page 2-85

Cost Centers

You can enable the automatic creation of HR organizations using the Auto Orgs functionality. If your enterprise has a close relationship between its financial structure and line management hierarchy, then this means you only have to maintain your financial structure in GL and the corresponding organizations that you need to create your line manager hierarchy are automatically generated. The application creates HR organizations corresponding to company cost center combinations that exist in your GL account combinations.

See: Internal Organizations and Cost Centers, page 2-72

Reporting on Organizations

Oracle HRMS and Oracle HRMSi enable you to produce several reports to satisfy the statutory requirements for your legislation and meet your business analysis needs. For example, Oracle HRMS provides you with a standard organization hierarchy report to view the relationships between organizations and their managers within a hierarchy.

Key Concepts

To effectively use Oracle HRMS for organization management, see:

Representing Organizations, page 2-5

Locations, page 2-62

Organization Hierarchies, page 2-85

Defaults for the Business Group, page 2-27

Internal Organizations and Cost Centers, page 2-72

Organization Structures

HRMS enables you to represent your whole enterprise. You can record the physical locations where your employees work and all the different departments and sections which make up your enterprise. You can also record information about other organization you work with, such as recruitment agencies.

You can view and edit hierarchy diagrams for organizations and positions using:

- The Organization Hierarchy Diagrammer
- The Position Hierarchy Diagrammer

How do you represent my enterprise as an employer?

You represent your enterprise by setting up a Business Group. A Business Group corresponds to an agency or group of agencies.

How do you represent the structure of an enterprise?

Oracle HRMS enables you to build a model of your enterprise showing all the reporting lines and other hierarchical relationships. You can set up reporting hierarchies reflecting all the reporting lines in your enterprise, as established in organization charts.

Do I need to run a separate program to create hierarchy diagrams?

No. The hierarchy diagrammers are standard Oracle HRMS windows, with the addition of a graphical area. They work together with the Organization Hierarchy window and Position Hierarchy window so you can create basic hierarchies using these windows and then make intuitive drag-and-drop changes using the diagrammers.

Any changes made using the hierarchy diagrammers are reflected in the hierarchy windows, and are saved in your database.

Can I create multiple versions of a hierarchy, and model different business scenarios?

Yes. You can use the diagrammers together with the organization and position hierarchy windows to:

- Create new versions of existing hierarchies
- Create copies of existing hierarchies
- Create future-dated hierarchies to prepare for reorganizations in advance

Can I print the graphical versions of the hierarchies?

Yes. You can print pictorial representations of organization and position hierarchies.

Can I create hierarchies that contain organizations from multiple business groups?

Yes. If you have the appropriate security access to more than one business group, you can include organizations from more than one business group in your hierarchy.

Organizations

Key Concepts for Representing Enterprises

You represent your enterprise using key organization structures in Oracle HRMS. These structures provide the framework so you can perform legal reporting, financial control, and management reporting. You can set up these organization structures yourself, or use the Configuration Workbench.

The Configuration Workbench delivers an integrated configuration management toolset for HR systems and assists in the evaluation, configuration, deployment, and maintenance of HR applications. The workbench suggests a basic structure of organizations for your enterprise based on configuration models.

See: Configuration Models for Your Enterprise Framework, page 2-22

Once the basic enterprise structure is set up, you add the additional organizations and locations that exist in your enterprise. You define the internal organizations that represent your internal divisions and departments, and you define the external organizations that represent the organizations outside of your enterprise. For example, you can set up an external organization to represent the tax office for which your enterprise uses for reporting purposes.

You can use organizations to represent many levels of your enterprise, from the highest level of organization that represents the whole enterprise, to the lowest level of organization that represents a section or department.

See: Extending the Enterprise Framework, page 2-7

See: Organization Classifications, page 2-11

See: Setting Up Organizations, page 2-31

Business Group

The business group represents a country in which your enterprise operates. You create it as an organization in Oracle HRMS, but it does not represent a specific organization within your enterprise structure, and you do not include it in your organization hierarchies. A business group enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

The critical factors for deciding when to use a separate business group, or an international business group, are based on the following factors:

- If you use Oracle Payroll
- The number of people you employ in a country

- If you require legislative support for Oracle HR

Generally the laws are so different in each country that to be compliant, there must be a different business group for each country in which an enterprise has employees.

Operating Company

An operating company represents a division or line of business within your enterprise that is legally registered for reporting in at least one country. An operating company is a holding company, a company within a company.

Ultimate Legal Entity

The ultimate legal entity represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization. The ultimate legal entity is the parent company or organization for all its subsidiaries and divisions. Oracle HRMS represents the ultimate legal entity with the GRE/Legal Entity organization classification.

Legal Entity/Employer

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. In an organization hierarchy, a legal entity may report to an operating company or to the ultimate legal entity.

A legal employer is a legal entity that is responsible for employing people in a particular country. Therefore, if you employ people in a country, then you must have at least one organization classified as a legal entity and a legal employer.

The Configuration Workbench classifies an organization as a GRE/Legal Entity where your enterprise operates in a country, and classifies it as an Employer if you employ people in that country also. For example, you can have a legal entity in a country where you do business, but do not employ people in that country.

Consolidated Legal Entity

A consolidated legal entity acts on behalf of multiple operating companies that are not legally registered, or simply on behalf of the enterprise in a country. You typically use the consolidated legal entity for when you have multiple operating companies in your enterprise, but for the purposes of consolidation, you group the information into one organization. For management reporting purposes, the organizations below the consolidated legal entity in an organization hierarchy, such as, your departments and sections, can report to any organization in the enterprise. However, for legal reporting purposes, they report up to the consolidated legal entity.

For information on how to model your enterprise using the key organization structures, see: Configuration Models for Your Enterprise Framework, page 2-22

Extending the Enterprise Framework

After you or the Configuration Workbench has set up your basic enterprise framework, you can extend it by setting up the additional organization structures that exist for your enterprise. You use internal organizations to represent the internal divisions or departments, and external organizations to represent the organizations outside of your enterprise for reporting or third-party payment purposes. External organizations can appear in your organization hierarchies together with internal organizations, and are defined in the same way.

See: Key Concepts for Representing Enterprises, page 2-5

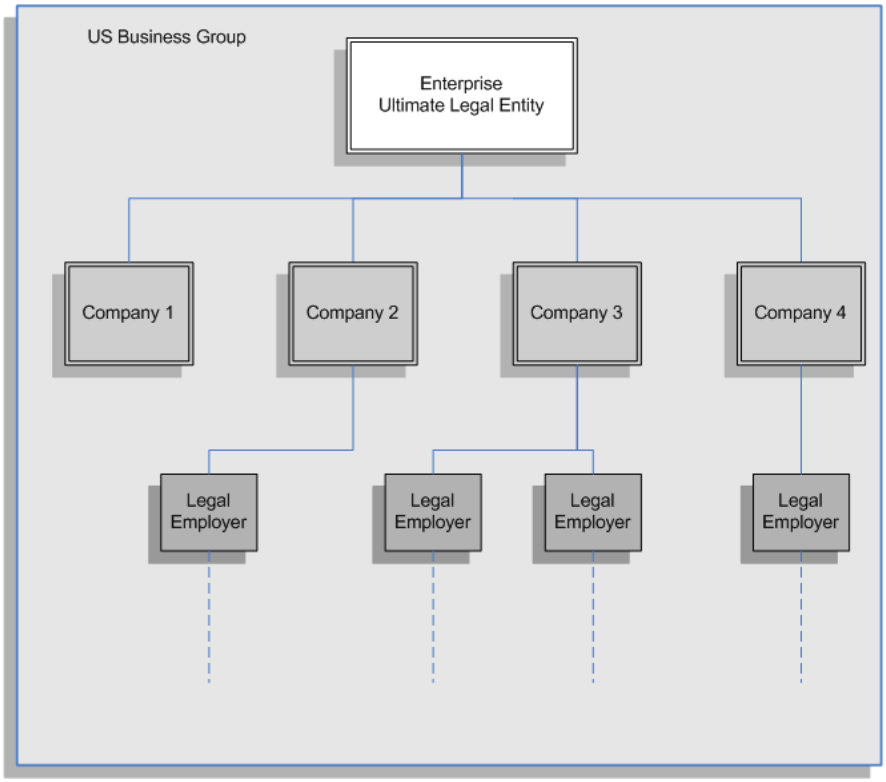
You use classifications to define the purpose of an organization, see: Organization Classifications, page 2-11

Basic Enterprise Structure

The following diagram demonstrates a basic enterprise structure, based on the multiple operating companies in one country configuration model. You generate the essential framework of your enterprise using the configuration model that suits your enterprise. The Configuration Workbench defines the basic structure of organizations in your enterprise and places them in an organization hierarchy.

See: Key Concepts for Representing Enterprises, page 2-5

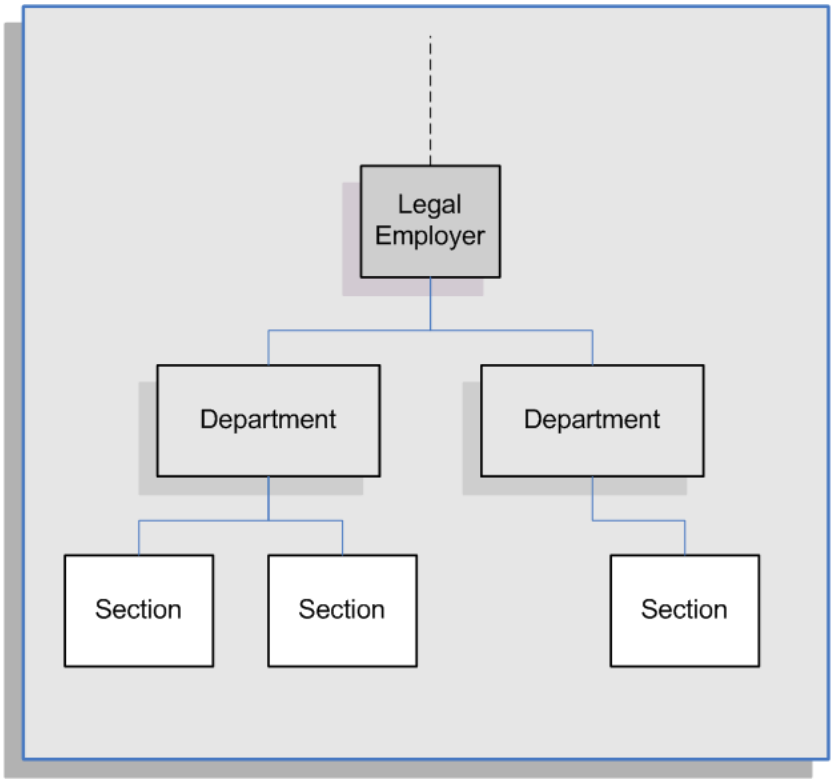
Basic Enterprise Structure



The preceding diagram displays an enterprise based in the U.S. with four separate divisions represented by Companies 1 - 4. The Legal Employers are responsible for employing people and represent the designated employers for all employment-related activities.

The following diagrams are examples of how you can set up and include additional internal and external organizations in your organization hierarchy. Each diagram uses a separate legal employer to explain how you can set up different organizations for different purposes. You can, however, use the same legal employer for each type of setup. You will probably use a combination of the following examples.

Reporting Structures Organization Setup



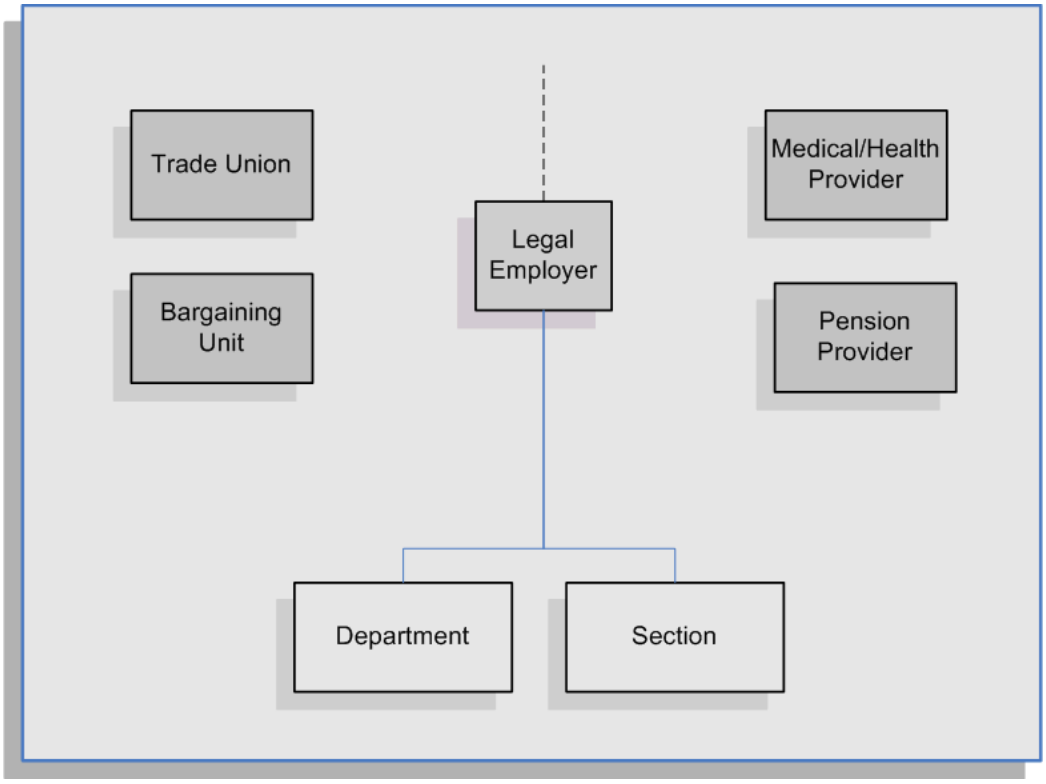
The organization setup in the preceding diagram represents a simplified structure of the different levels of management reporting. If your management reporting structures and your enterprise's costs are the same, then you can use roll-up reporting capabilities. For example, if you associate a cost center to an HR organization, you can record the payroll costs of the employees assigned to that organization, and the organizations below it in the hierarchy.

See: Internal Organizations and Cost Centers, page 2-72

You can also represent multiple or matrix reporting relationships by setting up one of more organization hierarchies. The organizations you set up can appear in one or several different hierarchies. The Configuration Workbench enables you to add new organizations on top of the basic enterprise structure using worksheets. You can then use the hierarchy diagrammers in Oracle HR to add or change the reporting lines.

See: Moving Organizations or Positions in a Hierarchy, page 2-102

Benefit Providers and Workers Representation Organization Setup

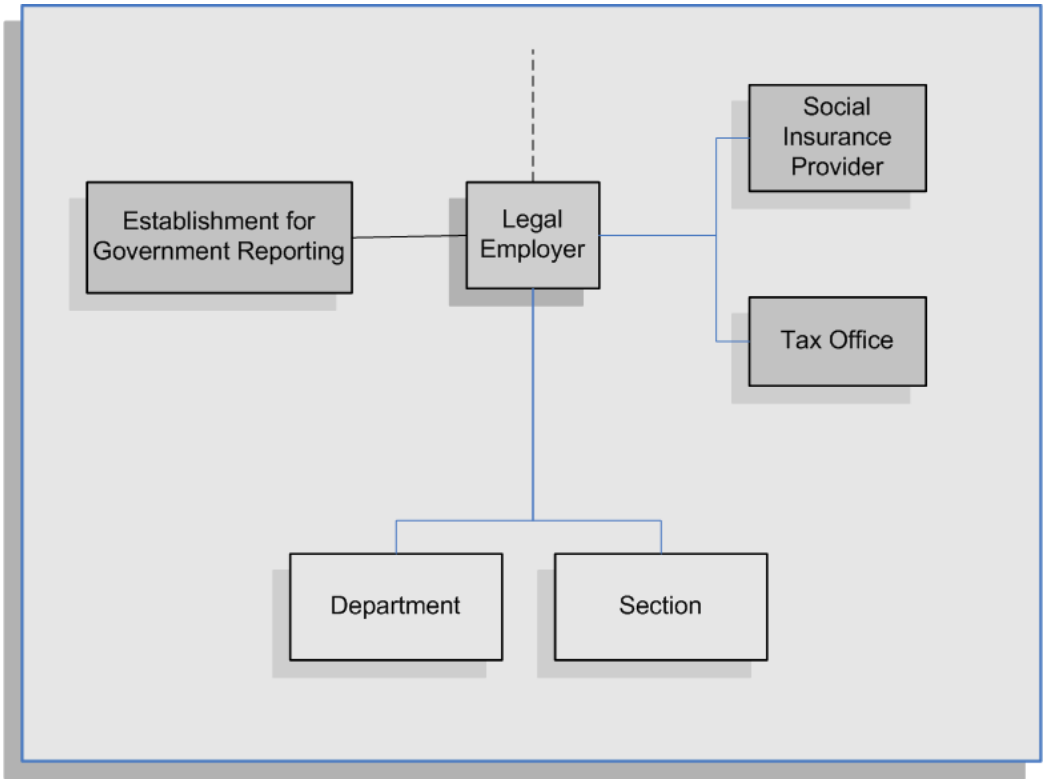


You can set up organizations to represent the benefit providers that supply benefits to the people in your enterprise. For example, in the preceding diagram, a pension provider and a medical/health provider are set up as external organizations in the business group. This set up provides your workforce in the Department and Section organizations with the opportunity to make pension contributions and receive medical cover from the benefit providers.

A trade union and bargaining unit are also set up as external organizations in the business group. These organizations represent the workers' representative bodies.

For more information on the classifications you can choose for your organizations, see: Organization Classifications, page 2-11

Government Reporting Organization Setup



Using the preceding diagram as an example, you use external organizations to represent the government reporting offices outside of your enterprise, such as social insurance providers, tax offices, and establishments. Linking the external organizations to your internal organizations enables:

- Your workforce to inherit the information that the external organizations provide.
- You to efficiently record all of the government reporting details at the legal employer level, rather than at the person level.
- You to meet statutory reporting requirements.

Organization Classifications

Organization classifications define the purpose of an organization and its functionality within Oracle HRMS. The classifications you assign to an organization control the additional information you can set up at the organization level. The Configuration Workbench automatically assigns the appropriate classifications to the organizations it creates.

For more information on the key organization structures you use to represent your

enterprise, see: Key Concepts for Representing Enterprises, page 2-5

You can define one organization with multiple classifications or you can define separate organizations to represent different types of entity. For example, you can classify an organization as a legal entity as well as an HR organization if it's the same organization. If they are different, then you create two organizations.

> **Note:** Oracle HRMS enables you to install your own additional information types for classifications.

You can select the following classifications in the Organization window, depending on your legislation:

All Legislations

All legislations can use the following classifications:

- **Business Group**: Use this classification to group, manage, and control access to data in accordance with the rules and reporting requirements of a country.

- **Operating Company**: An operating company represents a division or line of business within your enterprise that is legally registered for reporting in at least one country.

- **GRE/Legal Entity**: Use this classification to represent the following organizations:

  - **Ultimate Legal Entity**: this represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization.

  - **Legal Entity**: this represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer. In an organization hierarchy, a legal entity may report to an operating company or to the ultimate legal entity.

  - **Consolidated Legal Entity**: this organization acts on behalf of multiple operating companies that are not legally registered, or simply on behalf of the enterprise in a country.

    For Chinese users only: Your organization hierarchy must contain at least one GRE with corporate and employer information. Statutory reporting requires this information.

- **Employer:** Use this along with the GRE/Legal Entity classification to define an organization as a legal entity that is responsible for employing people in a particular country.

  For Indian users only: Your organization hierarchy must contain at least one GRE with income tax, challan bank, tax declaration and representative details. This

information is used for statutory reporting.

- **HR Organization**: Use this classification for all organizations to which you want to assign employees and contingent workers.

- **Payee Organization**: Use this when defining an external organization that is the recipient of a third party payment from an employee, for example a court-ordered payment. You can then select this organization on the Personal Payment Method window when entering a third party payment method.

- **Bargaining Association**: Use this when defining an organization that is involved in negotiating a collective agreement. A bargaining association could be any organization representing the employees in negotiations, for example a trade union. The UK legislation also enables you to select a bargaining association in the Union Processing window to set up a union element.

- **Representative Body**: Use this when defining a representative body. This may be a body defined in legislation, such as a European Works Council, or may be defined by the employer, such as a Sports and Social Club.

- **Disability Organization**: Use this when defining an external organization with which employee disabilities are registered.

- **Medical Service Provider**: Use this when defining an organization that provides any medical services, such as medical assessments, to the people in your enterprise.

- **Constituency**: Use this to define a constituency to group together workers eligible to vote for particular elections.

- **Company Cost Center**: Use this to define organizations in Oracle HRMS that map to cost centers in Oracle GL. You can set up your application so that whenever a cost center is defined in GL, a corresponding organization with this classification is defined automatically.

- **Professional Body Information**: Use this to define an organization that is a professional body. Organizations with this classification are available to assign to people in the Qualifications window.

- **Operating Unit** : Use the operating unit organization classification if you also use Multi-Org applications. You can associate an operating unit with an HR Organization. The application uses the HR Organization to find the operating unit to which a person belongs.

US Legislation

The US legislation can use the following classifications:

- **Reporting Establishment**, **Corporate Headquarters**, or **AAP Organization**: Use these when defining reporting organizations, that is, organizations required for the production of certain reports for government agencies.

- **Parent Entity**: Use this when defining an organization to be included at the top level of an establishment hierarchy. You can then use the hierarchy when producing certain reports for government agencies.

  If you are assigning this classification to a Business Group, you must assign it to your default Business Group, that is the one defined in your security profile. If you do not, then your data will not be visible when you attempt to create your hierarchy in the Generic Hierarchy window.

- **Benefits Carrier**, **Workers' Compensation Carrier**, or **Beneficiary Organization**: Use these when defining an external organization belonging in one of these classifications. You can then select the organization when defining a benefit, entering information for Workers' Compensation calculations, or recording beneficiaries employees have named for certain benefits.

  The Federal legislation can also use the **Beneficiary Organization** classification.

UK Legislation

The UK legislation can use the **Education Authority** classification to define a Local Education Authority (LEA) that is responsible for education within that council's jurisdiction.

Canadian Legislation

The Canadian legislation can use the following classifications:

- **Provincial Medical Carrier**: Use this to define a medical carrier for a province.

- **Provincial Reporting Establishment**: Use this to represent employees in the province of Quebec.

French Legislation

The French legislation can use the following classifications:

- **Company**: records one or more companies in your business group. A company is a legal entity registered to "Registre du Commerce et des Societes". You must have at least one company.

- **Establishment**: identifies the organization that serves as the legal point of contact for settling any disputes and manages the personal details of the workforce.

Note: Do not classify an organization as both a company and an establishment; create two separate organizations.

- **URSSAF Center** or **ASSEDIC Center**: specifies an external organization that is a Social Security organization. You can select the organization when entering additional organization information for an establishment. You can also select URSSAF organizations when entering additional organization information for a company.
- **Insurance Provider** or **Pension Provider**: defines an external organization that provides insurance or pensions. You can select the organization when entering additional organization information for a company or an establishment.
- **OPACIF** or **OPCA**: specifies an external organization that collects the company's yearly training contribution.
- **CPAM**: identifies an external organization as a CPAM office. You can select the organization when entering employment information in the People window.
- **Public Sector Other External Organization**: records details of the various types of external organizations with whom public-sector companies deal. Be sure to create organizations with this classification as external organizations.
- **Grouping of Employers**: identifies the employers (normally establishments) who have decided to group together to make it easier to lend each other workforce and also to list the employees, contingent workers, and employees on loan for an establishment from that grouping in the Personnel Registry report.
- **Tax Group**: defines an external tax office.

Dutch Legislation

The Dutch legislation can use the following classifications:

- **Dutch UWV Organization**: Use this to indicate if your organization is a social insurance provider. If you enable this classification, you can enter additional information such as the type of provider in the Dutch UWV Organization window.
- **Dutch Tax Office**: Use this to define an external tax office.
- **Dutch Private Health Insurance**: Use this to define an external organization that provides private health insurance.
- **Pension Provider**: Use this to define an external organization that provides pensions to your employees.

German Legislation

The German legislation can use the following classifications:

- **Budget Plan Unit**: Use this to define internal organizations for which you can use for the budget plan structure. The budget plan structure defines the different levels of positions in your enterprise, and the budget plan units represent the different levels as organizations. You select which budget plan unit the position belongs to in the Position window.

- **German Additional Second Pension Insurance**: Use this to record information about the contributions an organization makes to a second pension.

- **German Capitalized Life Insurance Provider**: Use this to indicate if your organization is a provider of German capitalized life insurance.

- **German Mandatory Health/Special Care Insurance Provider**: Use this to indicate if your organization is a provider of German mandatory health or special care insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Mandatory Pension Insurance Provider**: Use this to indicate if your organization is a provider of German mandatory pension insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Private Health/Special Care Insurance Provider**: Use this to indicate if your organization is a provider of German private health or special care insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Public Sector**: Use this to indicate if your organization is a public sector organization. If you set this to yes then certain public sector specific windows and fields are made available to you.

- **German Tax Office**: Use this to indicate if your organization is a tax office. If you set this to yes then you can enter additional tax office information using the Others button.

- **German Unemployment Insurance Provider**: Use this to indicate if your organization is a provider of German unemployment insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Voluntary Pension Provider**: Use this to indicator if your organization is a provider of German voluntary pensions.

- **German Work Incident Supervising Office**: Use this to indicate if your organization is a work incident supervising office.

- **German Workers' Liability Insurance Providers**: Use this to indicate if your organization is a provider of German workers' liability insurance.

Hong Kong Legislation

The Hong Kong legislation can use the **MPF Trustee Organization** classification to set up and enrol employees in an MPF Trustee. This classification allows you to record details of the trustee and details of the scheme provided by the trustee.

Mexico Legislation

The Mexico legislation must use the **legal employer** classification to define the legal entity. You can add additional organization information for your legal employer, if needed.

Use the **GRE/Legal Entity** classification to define an organization that is recognized as a separate employer by Social Security or other legal authorities. When you assign a location to a GRE, and you have not already associated them with each other in the generic hierarchy, HRMS will make the association for you.

Saudi Legislation

The Saudi legislation can use the following classifications:

- **Saudi GOSI Office**: Use this to represent the General Office of Social Insurance (GOSI) which the employer is registered. The GOSI office requires employers to make deductions for eligible employees and send all payments and reports to this office.

- **Saudi Employment Office**: Use this to represent an office to which the employer reports the status of its disabled employees.

Hungary Legislation

The Hungary legislation can use the following classifications:

- **Draft Agency**: Use this to represent an external defense organization to which you send employee military service details.

- **Company Information**: Use this to represent the organization which is legally entitled to hire employees.

- **Pension Provider**: Use this to indicate an external organization that provides pensions to your employees.

Spanish Legislation

The Spanish legislation can use the following classifications:

- **Work Center**: Use this to define an internal organization that represents a facility within your enterprise. You use these organizations for statutory reporting purposes.
- **Section**: Use this to define an internal organization that represents the place where people work. You use these organizations for internal reporting purposes only.
- **Tax Office**: Use this to indicate if the organization is an external tax office.
- **Tax Administration Office**: Use this to indicate if the organization is an external tax administration office.
- **Social Security Office**: Use this to define a social security office as an external organization. If you enable this classification, you can record the social security office details.
- **Social Security Province Office**: Use this to define an organization as an external social security office. If you enable this classification, you can enter the social security province office details.
- **Health Care Organization**: Use this to define an organization as an external health care organization. If you enable this classification, you can enter the insurance company details.

Korea Legislation

The Korean legislation can use the following classification:

- **Business Place**: Use this classification to define an organization as an employer to which you assign employees. You set up information such as the registration number, representative information, and the health insurance number for the National Tax Service (NTS).

Indian Legislation

Your organization hierarchy should contain at least one GRE/Legal Entity (Tax Organization) and Registered Company.

The Indian legislation can use the following classifications:

- **Registered Company**: Records your company's Legal Name, Registration Number, Corporate Identity Number, Permanent Account Number (PAN) of the company and company's representative details.

- **Factory**: Records your factory's Registration Number, License Number, National Industrial Code, Production Commencement Date and factory's representative details.

- **Shops/Establishment**: Records your shops/establishment's registration number and representative details.

- **Contractor Details**: Records a contractor's details, work details, and representative details. A contractor supplies contingent workers to an enterprise and can be either an individual or an external organization.

- **ESI Organization**: Use this to define an external organization that provides Employee State Insurance (ESI) to your employees. Records your Employee State Insurance (ESI) organization's Challan Information, General Information and Representative Details. You can have multiple ESI organizations and select an employee's ESI organization in the Assignment window.

- **Provident Fund Organization**: Records your PF organization's PF challan information, PF information, and PF representative details. You can have multiple PF organizations and select an employee's PF organization in the Assignment window.

- **Professional Tax Organization**: Records your Professional Tax organization's information, Professional Tax Challan information, and Representative Details information. You can have multiple professional tax organizations and select an employee's professional tax organization in the Assignment window.

- **Income Tax Office**: Records your income tax organization's information. You can enter the location details of the income tax office. You can select the income tax organization in the GRE/Legal Entity: Income Tax Details window.

Polish Legislation

The Polish legislation can use the following classifications:

- **PL SII Branch**: Use this classification to represent a local branch of the Social Insurance Institute (SII), a public organization that deals with the social insurance benefits, such as sickness allowance, maternity allowance, and rehabilitation benefits. You use the SII branch information for social insurance reporting.

- **PL Statistic Office**: Use this to represent a local statistic office. You use this information in reports sent to the statistic office.

- **PL Tax Office**: Use this to define the tax office bank accounts for the employer and for the tax collected from the employees. You use this information in statutory reports.

Norwegian Legislation

The Norwegian legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **Payee Organization**: Use this classification to define an external organization which receives third party payment from an employee
- **Social Security Office**: Use this to define external social security office organizations.
- **Pension Provider**: Use this classification to define an external organization that provides pensions to your employees.
- **Statement Provider**: Use this classification to define an external organization that provides reports on behalf of the legal employer.
- **Tax Office**: Use this classification to define an external tax organization.

Finnish Legislation

The Finnish legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **External Company**: Use this to record details of the various types of external organizations with whom your organization deals. Ensure to create organizations with this classification as external organizations.
- **Pension Provider**: Use this to record the basic information about pension insurance providers to which you transfer the appropriate pension insurance deductions.
- **Accident Insurance Provider**: Use this to identify organizations that provide accident insurance coverage, group life insurance, and unemployment insurance.
- **Finnish Magistrate Office**: Use this for identifying the authority responsible for processing the employee court orders.
- **Finnish Trade Union**: Use this to record the basic information about the employees' trade unions to process employee deductions.
- **Provincial Tax Office**: Use this to identify the legal employer's tax office.

Danish Legislation

The Danish legislation can use the following classifications:

- **Service Provider**: Use this classification to record details of the various types of external service providers with whom your organization deals.
- **Pension Provider**: Use this classification to define external pension providers.

Swedish Legislation

The Swedish legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **Social Security Office**: Use this to define external social security office organizations with which you coordinate medical reimbursements for the employees.
- **Swedish Enforcement Office**: Use this to define external enforcement office organizations with which you coordinate the attachment of earnings deductions for the employees.

South African Legislation

The South African legislation can use the following classification:

- **Training Provider**: Use this to indicate if an organization is a training provider.

UAE Legislation

The UAE legislation can use the **Legal Employer** classification to define and enter additional organization information for your legal employer.

Irish Legislation

The Irish legislation can use the following classifications:

- **Legal Employer**: Use this classification to define and enter additional organization information for your legal employer.
- **Pension Provider**: Use this classification to define external pension provider.

Configuration Models for Your Enterprise Framework

The first step in any configuration is to decide what organization structures your enterprise requires. To help you decide, you can use the following best practice configuration models:

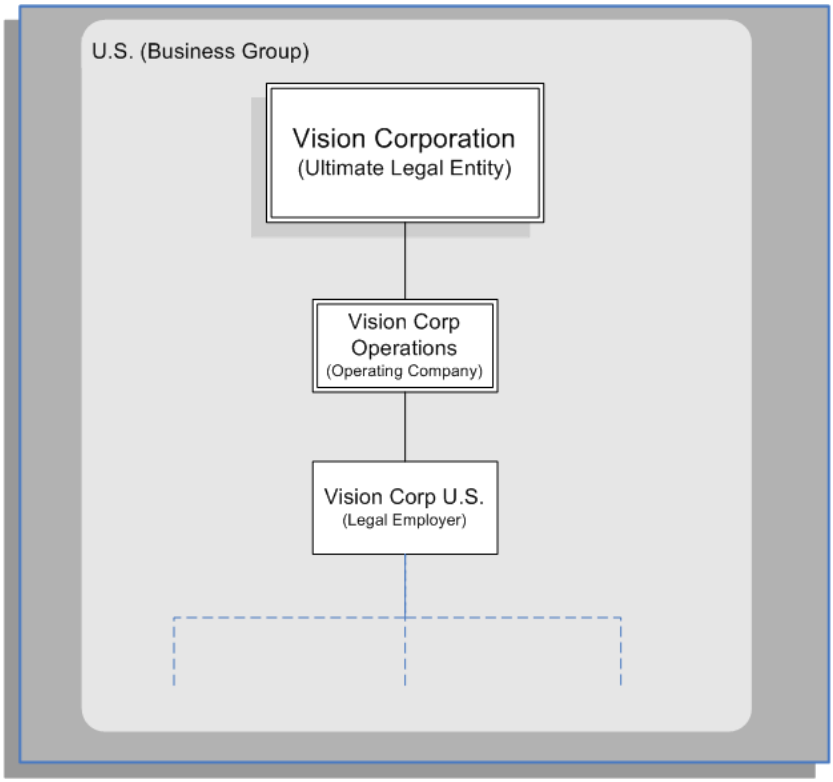
- Model 1: A single operating company in one country
- Model 2: A single operating company in multiple countries
- Model 3: Multiple operating companies in one country
- Model 4: Multiple operating companies in multiple countries

These models deal with integration points between the different applications and the requirements of different industries and geographies. They can help you choose the right organization structures to meet your management and reporting requirements.

The Configuration Workbench uses the models as templates to generate the organization framework of business groups, operating companies, legal entities, and employers for any enterprise. Through an interview process, the Configuration Workbench gathers the detailed information it requires to generate an actual configuration of your enterprise using the appropriate configuration model.

Mexico only: You cannot use the Configuration Workbench to create the hierarchy. You must use the Generic Hierarchy functionality.

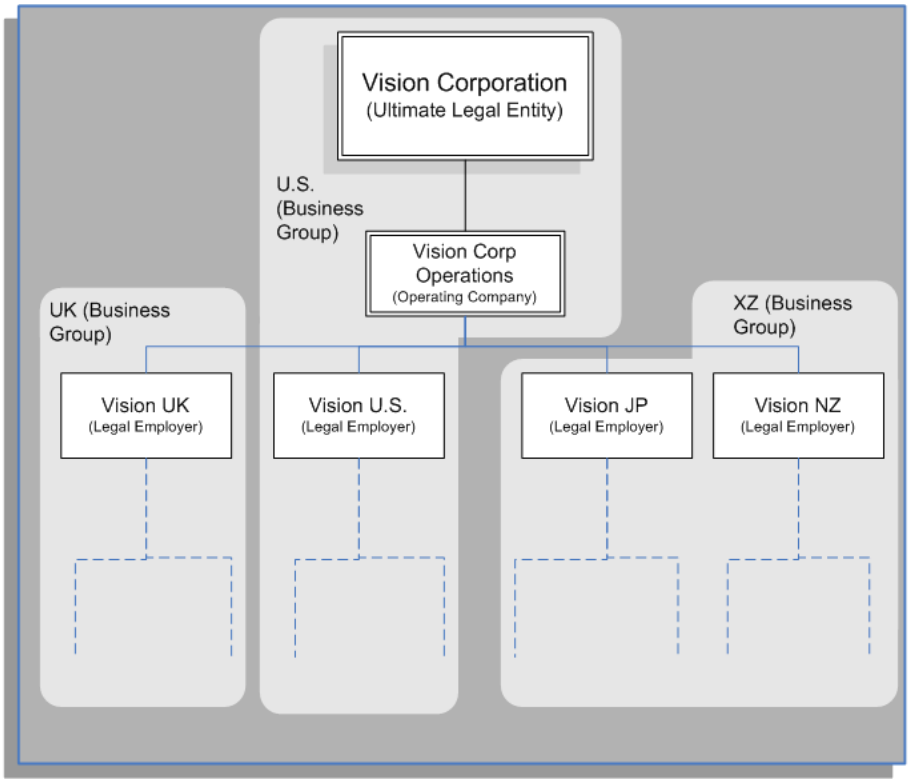
Single Operating Company in One Country



The preceding diagram shows the basic configuration for a small or medium sized enterprise with little or no complexity in operating structures. Vision Corporation is the ultimate legal entity, and for reporting purposes, this organization holds any data associated with the enterprise. Every enterprise has one ultimate legal entity.

This simple enterprise structure is based on the best practice configuration model. Creating the key enterprise structures as separate organizations enables your enterprise to expand and acquire new companies whilst reducing the cost of re-implementation.

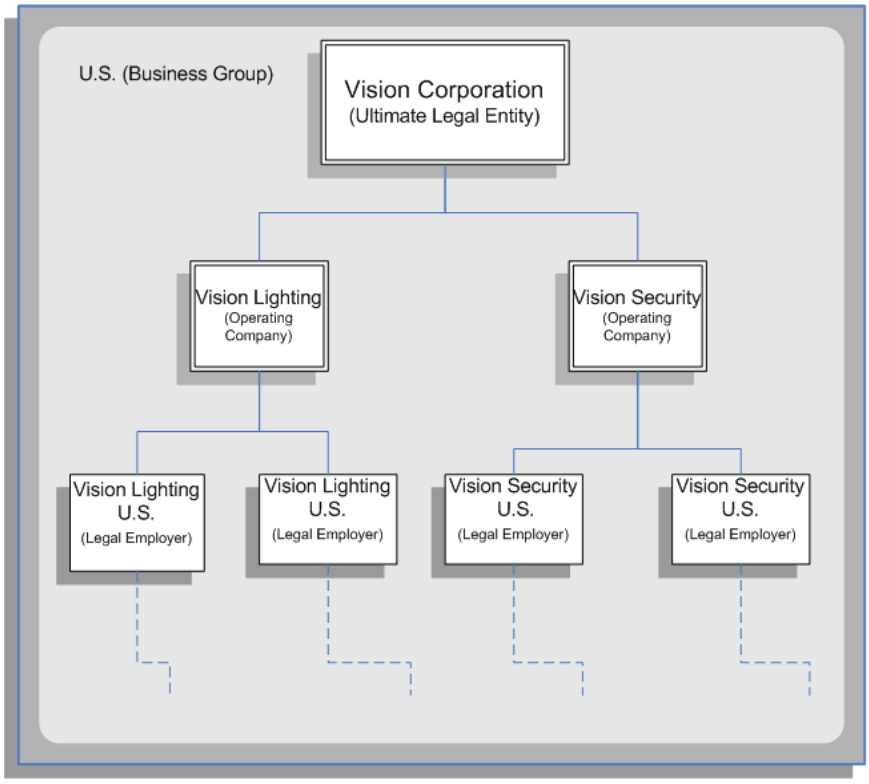
Single Operating Company in Multiple Countries



The preceding diagram shows a configuration for a medium or large enterprise with some international operations introducing a degree of complexity. It also shows that operations and people in some countries are held within an international business group (XZ). You can see that the business groups represent countries, and do not appear in the organization hierarchy. This is based on the best practice configuration model.

For more information on the key organization structures, see: Key Concepts for Representing Enterprises, page 2-5

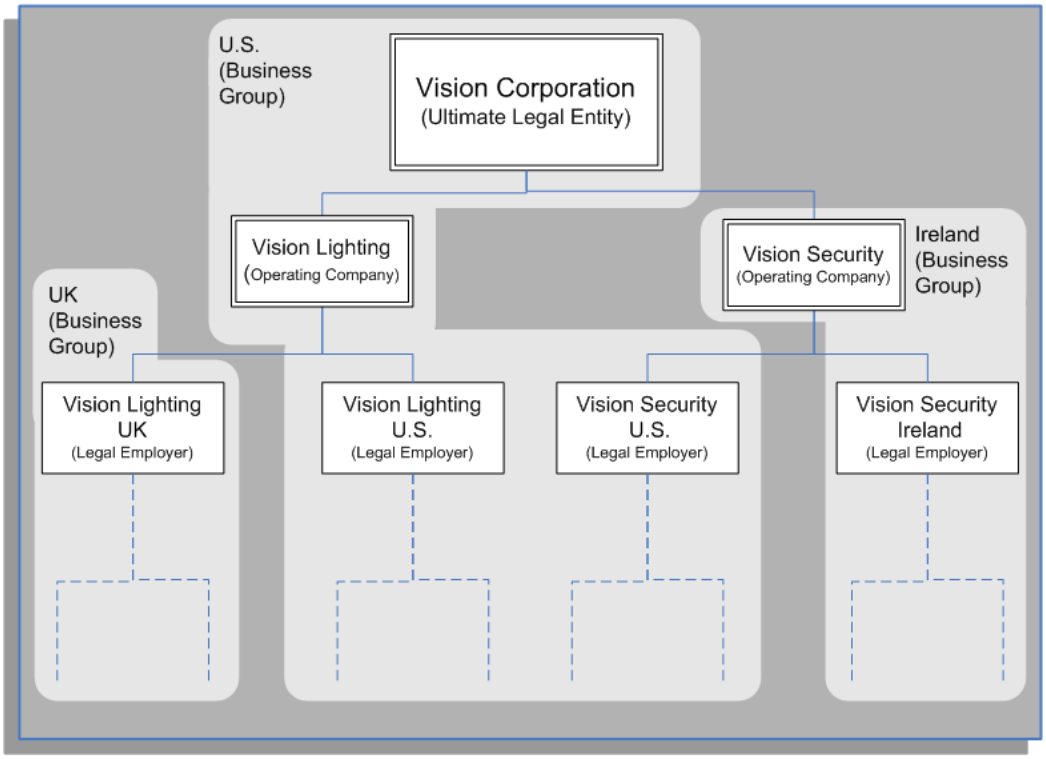
Multiple Operating Companies in One Country



The preceding diagram shows a configuration for a multi-company enterprise operating in a single country. This type of complexity can exist in any size of enterprise. Vision Lighting and Vision Security in the diagram are represented as operating companies. Every enterprise has at least one operating company. This may be a division, or a subsidiary within the enterprise which is legally registered in at least one country.

The Configuration Workbench creates at least one operating company organization as best practice. This reduces the cost of any re-implementation as a result of expansion due to acquisition or diversification within the enterprise.

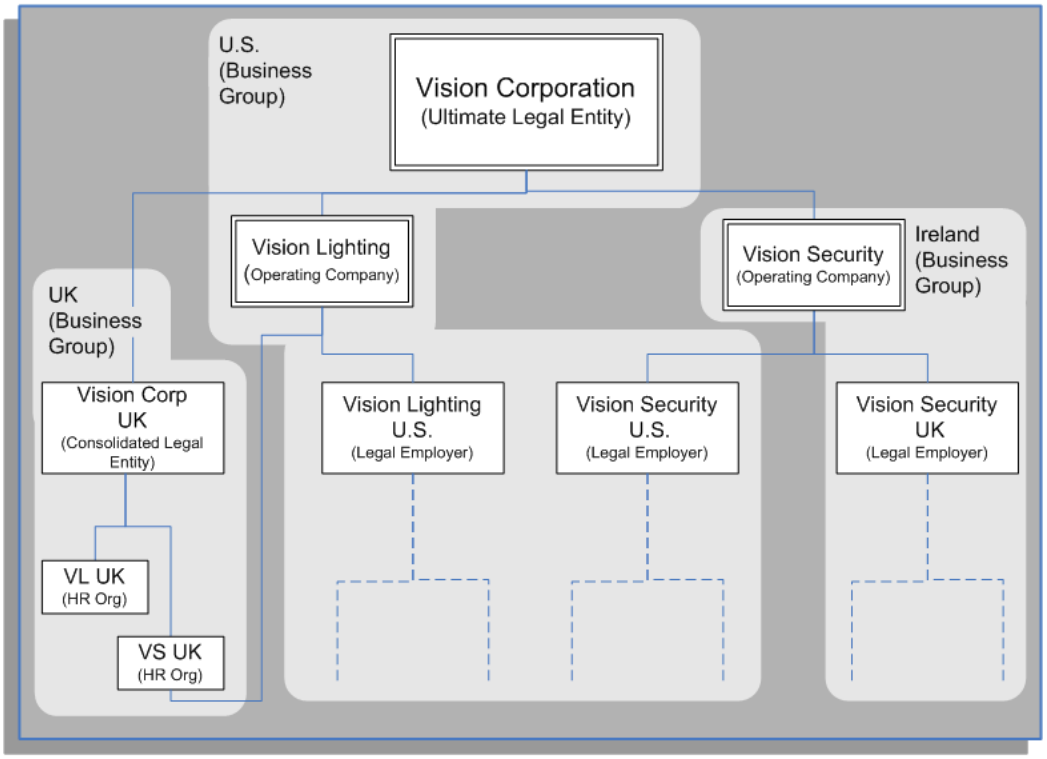
Multiple Operating Companies in Multiple Countries



The preceding diagram demonstrates a multi-company enterprise operating in multiple countries. Every enterprise has at least one legal entity that is the designated legal employer for all employment related activities. In the diagram, the Vision Security operating company operates and employs people in the U.S. and Ireland. The Vision Security U.S. and the Vision Security Ireland organizations represent the designated legal entities/employers in those countries.

The Configuration Workbench classifies an organization as a GRE/Legal Entity where your enterprise operates in a country, and classifies it as an Employer if you employ people in that country also. For example, you can have a legal entity in a country where you do business, but do not employ people in that country.

Multiple Operating Companies in Multiple Countries with a Consolidated Legal Entity



The preceding diagram shows an alternative configuration for a multi-national and multi-company enterprise with the addition of a consolidated legal entity. A consolidated legal entity acts on behalf of several operating companies or the enterprise, and is the legal employer in the country. Using the preceding diagram as an example, Vision Corp UK is the consolidated legal entity for Vision Corporation in the UK. For management reporting, VL UK and VS UK report to Vision Lighting, and for legal reporting, they report to Vision Corp UK.

For more information on the key organization structures, see: Key Concepts for Representing Enterprises, page 2-5

Defaults for the Business Group

You can enter certain types of information for the Business Group to appear as defaults throughout your enterprise structures:

- You can select a default currency.
- You can enter a default for the value each assignment contributes towards each staffing budget that you define. For example, by default an assignment may count as *one* for a headcount budget.

- You can enter default working hours for all the employees in the Business Group. You can override these defaults at organization, position, and assignment levels.

If you are using HRMS in the US, you have additional defaults:

- For HR reporting purposes you can register *Reporting Categories* and*Reporting Statuses*for the Business Group. These include employment categories such as Full Time or Part Time that cover employees who are not temporary workers, and assignment statuses such as Active or Paid Leave that cover employees who have not left your enterprise.

- You can register for the Business Group the names of the segments of its Cost Allocation key flexfield that hold cost center and labor distribution codes. This customizes the names that appear as field prompts in your BEE Windows.

Employee and Applicant Identification Numbers

When defining a Business Group, you choose a method of creating identifying numbers for its employees and applicants. The choices are:

- Automatic number generation

- Manual entry

- For employees only, automatic use of a national identifier, such as the US social security number, Canadian social insurance number or the UK National Insurance number

Generic Hierarchies Overview

Generic hierarchies group and correlate information about your business into an ordered structure of parent-child relationships that implementation teams can use as input parameters to reports and concurrent processes. One standard purpose for a generic hierarchy is to supply input parameters to a generic purge process you perform on temporary tables. With appropriate access rights, you can also design your own generic hierarchies from scratch. You can extend predefined hierarchy and node types, using any combination of HRMS data.

You can use the flexibility of generic hierarchies to correlate information across business groups, specifying combinations of people, jobs, competencies, grades, locations, training, or other structures, with precise scope. You can reuse hierarchies, delivering comparable and consistent information limited only by your maintenance of the hierarchies. You can process specific groupings of workers, process flexfield data, or trigger Oracle Alerts or Workflow. Here are some examples of business questions you can address using generic hierarchies:

- What is the competency hierarchy for a given job?
- Who is qualified for which job?
- Who can take leave on a given date?
- What training is available in which location, for which jobs?
- What objectives apply to which job?

Defining and Maintaining Generic Hierarchies

Defining a New Hierarchy

You create or maintain generic hierarchies in the Generic Hierarchies pages. You define a new hierarchy in three stages:

1. Create a hierarchy based on a predefined or user-defined hierarchy type.
2. Enter information about the initial version of the hierarchy and specify effective dates.

   Note: Some government-mandated reports, such as Multiple Work Site in the US, require that you submit the report within a specified date range. When you create the hierarchy, enter an effective date and end date to match or encompass that range.

   You cannot create a hierarchy version with an effective date range that overlaps another version.

3. Enter node information, based on predefined or user-defined node types.

Hierarchy Types and Node Types

The top node is the hierarchy type itself you create in the Generic Hierarchies pages, bearing a user-defined name, such as Competencies or Job Objectives. You define node types and add them to your hierarchy structure as child nodes, to specify the kind of information you want to include on each level. You can group related categories of nodes on the same level. For example, you can define Personal, Programming, and Communication node types, and include them on the same level in a competencies hierarchy. Validation is optional, but you must link a value set to a node type if you want to validate the data. Contact your system administrator to obtain access to the Maintain Hierarchy Types module by attaching the self-service menu PQH_GHR_MENU to your responsibility.

For example, the structure of the predefined Establishment Hierarchy type ("VETS, EEO, AAP, OSHA, Multi Work Sites") specifies that the top node must be a Parent Entity. The value set for a Parent Entity node type contains organizations with the

classification of Parent Entity. Subordinate nodes must be an Establishment or a Location. The value set for the Location node type contains locations that store report information in a Location EIT.

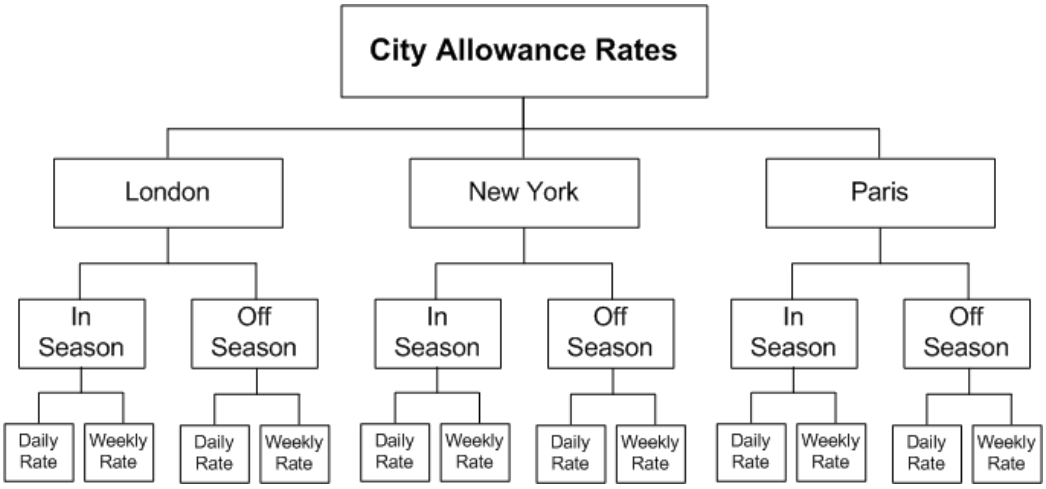
Hierarchy Versions

You can specify a status of Active or Inactive for your hierarchy version. You can create a new version of an existing hierarchy, preserving only its structure. Or you can duplicate an existing version, preserving both its structure and data.

> **Note:** If you change a hierarchy after using it for government-mandated reports, create and save a new version. This enables you to use the old version to recreate old reports retrospectively, in compliance with applicable laws.

Example: City Allowance Rates Hierarchy

The figure below is an example of a hierarchy that provides input data for travel expense reports, correlating allowance rates with cities. Because it is unlikely that travel destinations always correspond with organization locations, this example uses no validation or value sets.



Government Reporting Entities (GREs)

After defining one or more Business Groups for your enterprise, you set up one or more *Government Reporting Entities* (GREs) within each Business Group. The GRE is the organization that federal, state and local governments recognize as the employer who:

- Issues pay to employees.
- Withholds taxes from employees' pay and is liable for employer taxes and tax reporting.

- Provides other government-mandated reporting, such as OSHA and New Hire reports.

> **Important:** The GRE in the Oracle HRMS products is the same organization as the Legal Entity that appears in the Oracle Financials products, holding the taxpayer identification number. For this reason, the GRE may appear as GRE/Legal Entity on pick lists.
>
> Enterprises using Oracle HRMS and Oracle Financials products should define only one GRE/Legal Entity to represent each employer organization with a unique IRS identification number.

Each GRE has a unique 9-digit number (sometimes called the *employer identification number* or *taxpayer identification number*) issued by the IRS.

Enterprises with only one identification number from the IRS need only one GRE in which to place all employees. In Oracle HRMS, the Business Group and the GRE are the same organization.

The federal government *does not* use GREs for tax purposes. To complete the business group information, you must enter a GRE, but you can use any sequence of numbers for that data.

See: GREs: Entering the IRS Identification Number, page 2-47

Setting Up Organizations

You set up organizations to represent your enterprise structure in Oracle HRMS. To find out what organizations you require for your enterprise, see: Key Concepts for Representing Enterprises, page 2-5

Once you define your basic enterprise structure, you create the additional organizations and locations to represent the internal divisions or departments, and the external organizations for reporting or third-party payments.

See: Extending the Enterprise Framework, page 2-7

1. Create your locations. You define each location and address once only.

   See: Setting Up Locations, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Create your organizations.

   > **Tip:** To simplify your data-entry, consider using a fixed date as a default for your initial setup, for example, 01-JAN-1951.

   See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Enter the appropriate classifications for each organization.

   See: Entering Organization Classifications, page 2-33

4. Enter details for any extra information types.

   See: Entering Additional Information, *Oracle HRMS Enterprise and Workforce Management Guide*

Creating an Organization

Use the Organizations window to create:

- Business Groups
- External organizations (for example, benefit carriers and recruitment agencies)
- Internal organizations (for example, departments, sections or cost centers)
- GREs/Legal Entities

To create a new organization:

1. Navigate to the Organization window and select the New button to create a new organization.

   Note: For information about querying existing organizations, see Finding an Organization, page 2-38.

2. Enter a name that is unique within the Business Group in the Name field.

   All Oracle applications you install share the information entered in the Organization window. Therefore organization names must be unique within a Business Group, and Business Group names must be unique across your applications network.

   The application automatically populates the name in other places to ensure consistency for reporting purposes: the OCT Org Title segment of the US Federal Org Report Information Business Group Info and the Position Org segment of the Position Group 1 Extra Information.

   You can create two organizations with the same name in different business groups but this can cause confusion later, if the HR: Cross business group profile option is set to Yes and you decide to share certain information across all business groups. If you decide to create two organizations with the same name, be sure that this will not cause you problems in the future.

3. Optionally, select an organization type in the Type field. Organization types do not

classify your organization, you use them for reporting purposes only. The type may, for example, identify the function an organization performs, such as Administration, or the level of each organization in your enterprise, such as department or Cost Center. You create the organization types you require by entering values for the Lookup Type ORG_TYPE.

4. Enter a start date in the From field. This should be early enough to include any historical information you need to enter.

   Note: You cannot assign an employee to an organization before the start date of the organization.

5. Select a location to record the site address. You can also enter an internal address to add more details such as a floor or office number.

   See: Setting up Locations, page 2-62

   Note: If you are an Oracle Inventory user, then you must not assign a location to more than one organization classified as an Inventory Organization.

6. Enter internal or external in the Internal or External field. You cannot assign people to an external organization.

   Examples of external organizations that may require entry are benefits carriers and organizations that are recipients of third party payments from employees' pay.

7. Save the basic organization details.

What's Next

After you create an organization you must:

- Enter Organization Classifications, page 2-11
- Enter Additional Information, page 2-34

Entering Organization Classifications

To determine the purpose and use of each organization you create, you give it one or more classifications. The setup information you enter for an organization depends in large part on its classification.

See: Organization Classifications, page 2-11

Note: If you classify an organization as a business group, it is not

reversible.

To enter organization classifications:

1. Enter the classification for your organization in the Name field.
2. Enable the classification by checking the Enable box. This allows you to use and enter the essential additional information for your organization.
3. Save the classification details.
4. You can either enter additional information for the classification type or enter another classification.

Note: Save each classification after entering and enabling it.

Entering Additional Information

For each classification you set up you can enter additional information. You can enter different additional information for each classification.

For business group see: Business Group, page 2-34

For HR organization see: HR Organization, page 2-34

For representative body see: Representative Body, page 2-34

For bargaining association see: Bargaining Association, page 2-34

For constituency see: Constituency, page 2-34

For GRE see: GRE, page 2-47

For company cost center see: Company Cost Center, page 2-34

For professional body information see: Professional Body Information, page 2-34

To enter Business Group additional information:

1. Click the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
   - Business Group Information, see Entering Business Group Information, page 2-40

- Budget Value Defaults, see Business Groups: Entering Budget Value Defaults, page 2-43
- Work Day Information, see Business Groups and HR Organizations: Work Day Defaults, page 2-44
- Benefit Defaults, see: Business Groups: Defining a Default Monthly Payroll, page 2-45
- PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, page 2-43
- Self Service Preference Information, see: Entering Self-Service Preference Information, page 2-49
- Related Organizations Information, see: Entering Related Organizations Information for an HR Organization, page 2-59

4. Repeat these steps to enter further information.

To enter HR organization additional information:

1. Click the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
   - Costing information, see HR Organizations: Entering Costing Information, page 2-48
   - Parent Organization, see: HR Organizations: Entering Parent Organizations, page 2-52
   - Work Day information, see Business Groups and HR Organizations: Work Day Defaults:, page 2-44
   - Federal reports, see HR Organizations: Entering US Federal Reporting Information, page 2-52
   - Self Service Preference Information, see Entering Self-Service Preference Information, page 2-49
4. Click a field to open the full window.

5. Repeat these steps to enter further information.

To enter further information:

1. Click the organization classification for which you want to enter additional information.

2. If multiple fields exist in the Additional Organization Information window you can repeat these steps again.

   The Additional Information window displays the information you enter in a condensed format.

3. Save your additional information entry.

To enter GRE additional information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Employer Identification, see GRE's: Entering the IRS Identification Number, page 2-47

   - New Hire Reporting, see Entering New Hire Information for a GRE, page 2-48

   - Parent Organization, see Placing Subordinate Reporting Organizations in Hierarchies, page 6-116

To enter representative body additional information:

1. Click the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Representative Body Information, see: Entering Representative Body Information, page 2-54

   - Constituency information, see: Entering Constituency Information for a

Representative Body, page 2-55

4. Repeat these steps to enter further information.

To enter constituency additional information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Location, see Entering Location Information for Constituencies, page 2-56
   - Organization, see Entering Organization Information for Constituencies, page 2-56
   - Organization Hierarchy, see Entering Organization Hierarchy information for Constituencies, page 2-55
   - Grade, see Entering Grade information for Constituencies, page 2-56
   - Job, see Entering Job information for Constituencies, page 2-57
   - Collective Agreement Grade, see Entering Collective Agreement Grade information for Constituencies, page 2-57

4. Repeat these steps to enter further information.

To enter bargaining association information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select Trade Union Information, see: Entering Trade Union Information for a Bargaining Association, page 2-58

4. Repeat these steps to enter further information.

To enter company cost center information:

1. Click on the organization classification for which you want to enter additional

information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - GL Company Cost Center, see: Entering GL Company Cost Center Information for a Company Cost Center, page 2-53

   - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center., page 2-51

4. Repeat these steps to enter further information.

To enter professional body information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select Professional Body Info, see: Entering Additional Information for a Professional Body, page 2-58.

4. Repeat these steps to enter further information.

Finding an Organization

Use the Find Organization window to find the organizations you want to review or amend. If you want to set up a new organization, rather than querying an existing organization, select the New button. For more information about creating a new organization, see Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*.

> **Note:** When you navigate to the Organization window, the Find Organization window automatically displays.

To query an organization using the Find Organization window:

1. Do one, a selection, or all of the following:

   - Enter a full or partial query on the organization's name. If more than one name matches the selection criteria, select one of the names.

- Enter a full or partial query on the organization type and/or location. If more than one organization type or location matches the selection criteria, select the type and/or location to query.

- Enter a full or partial query on the classification name. If more than one classification name matches the selection criteria, select the name to query.

  For the classification you have selected indicate whether you want to query on:

  - **Enabledclassifications**: This only returns those organizations that match your selection criteria and have your selected classification enabled.

  - **Disabled classification**: This only returns those organizations that match your selection criteria and have your selected classification disabled.

  - **Both:** This returns organizations that match your selection criteria and have your selected classification, regardless of whether the classification is enabled or disabled.

2. Choose the:

   - **Find** button to run the query.

     The organization or organizations found by the query display in the Organization window. If the query finds more than one organization, you can use the [Down Arrow] key or choose Next Record from the Go menu to display the next organization.

   - **Clear** buttonto remove the existing selection criteria. You can then enter new information on which to perform a query.

Removing and Deleting Organizations

Remove an organization if you want to prevent it being available for employee assignments. This still leaves a history of the organization. Only delete an organization if you want to completely remove it from your system.

To remove an organization:

1. Select the organization you want to remove.

2. Enter an end date (Date To) on the organization record.

To delete an organization:

1. Remove any employee assignments to the organization.

2. Remove the organization from any hierarchies.

3. Disable its organization classifications in the Organization window.

4. Delete the organization in the Organization window.

Entering Business Group Information

Oracle HRMS comes with one Business Group supplied as startup data. You can use this Business Group and its default definitions as the starting point for your own Business Group, or you can create a new organization and define this as your new Business Group.

To enter Business Group information:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the Others button, and select Business Group Information.

2. Click a field of the Additional Organization Information window to open the Business Group Information window.

3. You can enter a short name for the Business Group. This name is no longer used in Oracle HRMS. It is provided for compatibility with earlier releases, where it appeared in the header line of each form.

4. Select the method of creating identifying numbers for employees, applicants, and contingent workers. The choices are:

   - Automatic number generation.

     If you choose the automatic entry method of number generation you can at a later date decide to switch to global sequencing. Global sequencing allows you to use a single sequence of person numbers for applicants, employees or contingent workers across multiple business groups.

     See: Running the Global Sequencing for Person Number Generation Process, page 2-60

     You can switch from local automatic numbering to manual numbering for a person type by editing the business group information and selecting Manual.

     > **Note:** If you are using Oracle iRecruitment, ensure to set the applicant numbering to Automatic.

   - Manual entry.

If you choose the manual entry method of number generation, but at a later date decide to change to the Automatic method of number generation, you can run the Change Person Numbering to Automatic process.

See: Running the Change Person Numbering to Automatic Process, page 2-59

- Automatic use of the national identifier (for example, the social security number in the US, and the NI number in the UK). If you choose this option you must ensure that a national identifier is entered for each new person. This option is not available for applicants.

  Note: For whichever method of number generation you choose, it is important to be aware that the number is displayed in various windows and reports. Therefore, if you choose the national identifier method, the person's national identifier is displayed.

- Employee numbering for contingent worker. This option allows you to use the same sequence of numbers for contingent workers as you use for your employees. For example, you enter an employee and the application gives the employee number 101. If the next person entered is a contingent worker they receive the number 102.

5. Select the key flexfield structures that you defined during implementation:
   - Grade: US Federal Grade
   - Group: People Group Flexfield
   - Job: Job Flexfield
   - Costing: Cost Allocation Flexfield
   - Position: Position Flexfield
   - Competence: Competence Flexfield

6. Select the appropriate Legislation Code and default currency.

   The Legislation Code determines the startup data you can access and the contents of some legislation-specific windows.

   Note: Selecting the correct legislation code is essential for the correct functioning of the product. You cannot change the legislation code after entering employees against the Business Group.

7. If you are using HRMS in the US, to maintain fiscal year balances in Oracle Payroll if your fiscal year is different from the calendar year, enter the fiscal year start date.

8. You can enter a Minimum and Maximum Working Age for the Business Group. When you enter or hire employees, you receive a warning if the person's age is outside this range.

9. Save your work.

10. Choose the Others button and choose US Federal Org Information from the Additional Organization Information lookups.

    If your agency *does not* use the National Finance Center as a provider, enter the following information:

    - In the Occupational Series field, choose Segment1 of the Job key flexfield.
    - In the Position Title, Position Description, Sequence Number, and Agency Code/Subelement fields, choose the segment you defined during implementation in the Position key flexfield.

    If your agency doesuse the National Finance Center as a provider, enter the following information:

    - In the Occupational Series field, choose Segment1 of the Job key flexfield.
    - In the Position Title field, choose Segment1 of the Position key flexfield.
    - In the Position Description Number field, choose Segment5 of the Position key flexfield.
    - In the Sequence Number field, choose Segment6 of the Position key flexfield.
    - In the Agency Code/Subelement Code field, choose Segment2 of the Position key flexfield.

11. Choose the Others button and choose Benefits Defaults from the Additional Organization Information lookups.

12. Choose the Next button to display the Benefits Defaults window and select a monthly payroll for this business group.

13. Enter a GRE number.

    Although the federal government does not use GREs for tax purposes, at implementation you must set up at least one GRE organization.

    See: GREs: Entering the IRS Identification Number, page 2-47

14. Save your work.

Business Groups: Entering Budget Value Defaults

You can set up budgets for non-monetary measures such as headcount or full-time equivalent. When you enter employee assignments to define the work an employee does for your enterprise, you can specify the value of the assignment towards these budgets. For example, all assignments typically count as *one* for headcount budgets, but may count as less than one for full-time equivalent budgets.

To remove the requirement to enter these values for every assignment, you can enter defaults for the whole Business Group. You can override the defaults for individual assignments.

To define budget value defaults:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the Others button, and select Budget Value Defaults.

2. Click in a field of the Additional Organization Information window to open the Budget Value Defaults window.

3. In the Units field, select a measurement type, such as Full Time Equivalent or Headcount.

4. Enter a default value in the Value field.

   You can enter a default value for as many budgetary units as you plan to use for the Business Group.

   To find out more about budgets see: Budgeting Overview, page 4-1

Business Groups: Selecting a PTO Balance Type

If you use Oracle Payroll, you can choose to use a payroll balance to store gross accruals for an accrual plan. The payroll balance is maintained by the payroll run. It calculates accruals from the day after either the Date Earned *or* the Date Paid of the last payroll period in which the assignment was processed

To specify whether to use Date Earned or Date Paid for all your accrual plans, select a PTO Balance Type for your business group. The default is Date Paid.

To select a PTO balance type:

1. In the Organization window, query the business group if it does not already appear there. In the Organization Classifications region, select Business Group, choose Others, and select PTO Balance Type.

2. Click in the field on the Additional Organization Information window to open the PTO Balance Type window.

3. Select Date Paid or Date Earned in the PTO Balance Type field.

4. Save your work.

Business Groups and HR Organizations: Entering Work Day Defaults

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 Organization window. You can set up default working hours for all employees in the Business Group or in an HR Organization, saving data entry at lower levels. When necessary, you can override the defaults at lower levels, for example, for individual positions or employee assignments.

> **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 Salary Administration process uses working hours information to prorate the salary values against which it validates any salary proposals.

To define work day defaults:

1. In the Organization window, query the Business Group or HR Organization if it does not already appear there. In the Organization Classifications region, select Business Group or HR Organization, choose the Others button, and select Work Day Information.

2. Click in the field of the Additional Organization Information window to open the Work Day Information window.

3. Enter the normal start and end times in 24 hour format. For example, for 5.30 p.m., enter 17:30.

4. Enter a number in the Working Hours field, and select the corresponding period of time in the Frequency field. For example, enter 40 and select Week.

   You can add to the list of available frequencies by making entries for the Lookup Type FREQUENCY, using the Application Utilities Lookups window.

Defining Benefits Defaults for a Business Group

Follow this procedure to define a default payroll for benefits administration and to configure the use of benefits assignments.

You use both the Payroll Description window and the Organization window to assign a default payroll to a business group.

When a benefits assignment is created for an employee, due to their termination or other qualifying event, the benefits assignment must have a default payroll.

You can indicate if you want the application to auto-generate benefits assignments for qualifying events. For US customers, the application creates benefits assignments by default.

Use the Organization window to define benefits defaults.

To define benefits defaults for a business group:

1. Select the business group for which you want to define a default payroll using the Find Organization window.

2. Place the cursor in the Organization classifications block on the Business Group field and choose the Others button.

3. Select Benefits Defaults from the Additional Organization Information lookups.

4. Choose the Next button to display the Benefits Defaults window.

5. Select a default payroll for this business group.

   If you set up a default payroll of biweekly, choose Biweekly, or monthly, choose Monthly.

6. In the Benefits Assignment field, select Yes to record benefits assignments for continuing benefits eligibility.

7. Save your work.

Business Groups: Entering Recruitment Information

You enter recruitment information at the business group level to define various default values for iRecruitment.

You enter additional information for iRecruitment in the Organization window of Oracle HRMS.

To enter Recruitment information:

1. In the Organization window, query the business group. In the Organization Classifications region, select Business Group, choose the Others button, and select Recruitment.

2. Click in a field of the Additional Organization Information window to open the Recruitment information window.

3. Specify how the vacancy code is allocated. The choices are:

   - Manual - the Vacancy Name field is displayed when you create a vacancy. You must manually enter a name for the vacancy.

   - Automatic - the application assigns a unique vacancy name automatically. The Vacancy Name field is not displayed when you create a vacancy.

4. Enter the default number of openings for a vacancy. The default number is displayed in the Total Openings field when you create a vacancy. You can overwrite the default value if required.

5. You can specify the organization defaulting method. The choices are:

   - Creator - The default organization for a vacancy is the organization for the person who has created the vacancy (employee who has logged in).

   - Manager - The default organization for a vacancy is the organization for the manager of the vacancy.

   You can overwrite these defaults when you create a vacancy. Both methods use the primary assignment.

6. Specify the location defaulting method. The choices are:

   - Manager - The default location for the vacancy is the same location as the manager for the vacancy.

   - Position - The default location for the vacancy is the same location as the position for the vacancy.

7. You can select a default budget measurement type, for example, FTE or headcount.

   To find out more about budgets, see Budgeting Overview, page 4-1

8. Select a default status which is assigned to a candidate when a candidate withdraws an application. If you do not specify a particular status here, the candidate receives the Terminate status.

9. Specify a user-defined person type as a default for candidates who register in iRecruitment. Oracle HRMS creates a record with this default person type when a candidate registers in iRecruitment. If you do not specify a value, the default person type is Candidate.

   Note: The user person type that you define here is associated with the External system person type. The internal code for this system person type is OTHER.

10. Select Yes if you want to exclude this business group from the list of business groups available on the Create Vacancy page. You should do this if you do not want managers or recruiters to be able to create vacancies for this business group.

11. Select a default resume template that iRecruitment can use to create resumes for candidates. When candidates register, they can use the default template or select a template of their choice in the Create Resume page.

12. Select Yes to record and track applicant data for compliance purposes. When you enable the applicant tracking functionality, Oracle iRecruitment creates snapshots of applicants who apply for vacancies in that business group. The snapshots include personal information, skills, qualifications, and work preferences.

13. Save your work.

GREs: Entering the IRS Identification Number

The federal government does not use GREs for tax purposes. At implementation, however, you must at least enter a unique GRE number for the business group.

To enter the unique identification number for the GRE:

1. In the Organization window, query the GRE if it does not already appear there. In the Organization Classifications region, select Government Reporting Entity, choose the Others button, and select Employer Identification.

2. Click a field of the Additional Organization Information window to open the Employer Identification window.

3. Enter a number for the GRE. You can use any sequence of numbers for this field.

   Note: If required, a Retirement Organization may have the same Employer Identification Number as an existing GRE.

Entering New Hire Report Information for a GRE

For each GRE, you can maintain specific new hire information for the New Hire State Report and the New Hire State Magnetic Media report.

You can enter new hire information for a GRE in the Organization window.

To enter new hire information for a GRE:

1. In the Organization window, query the GRE if it does not already appear there. With the cursor in Government Reporting Entity in the Organization Classifications region, choose the Others button and select New Hire Reporting.

2. Click in the field that appears in the Additional Organization Information window to open the New Hire Reporting window.

3. Select the name of the employee serving as the GRE contact for new hire reporting. The new hire reports find the employee's job title and work telephone number in the database and prints the contact name, title and phone number on the report.

4. Select Yes in the Transmitter(NY) field to identify this GRE as the transmitter of the report. This field only applies to the New Hire State Magnetic Media report and if the reporting state is New York.

   Note: If you have multiple GREs in your organization, only one can be the transmitter of the report. If more than one GRE is selected, the report will error.

HR Organizations: Entering Costing Information

To enter costing information:

1. In the Organization window, query the HR Organization if it does not already appear there. In the Organization Classifications region, select HR Organizations, choose Others, and select Costing Information.

2. Click in the Additional Information window to display the segments of the Cost Allocation flexfield set up with the qualifier of Organization.

3. Select the appropriate cost code in each segment.

   For individual employees, you can override these organization-level codes by entering costing information on their assignments.

Entering Self-Service Preference Information

You enter self-service preference information to define whether documents such as the online payslip or tax form are available in an online and/or paper version.

> **Note:** You can also enter this information at the Person or Location level.
>
> See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* and Location Extra Information Types, *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 will 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 will override settings at the business group level.

To enter Self-Service Preference information:

1. In the Organization window, query the Business Group or HR Organization if it does not already appear there.
2. In the Organization Classifications region, select Business Group or HR Organization, choose Others, and select Self Service Preference.
3. Click in a field of the Additional Organization Information window to open the Self Service Preference window.
4. Select the document type for which you want to define preferences.
5. Select whether you want the document to be available online.
6. Select whether you want the document to be available on paper.
7. For online payslips if you are providing payslips in PDF format, specify:
   - The payslip template you wish to use.

- If you wish to append custom data to the generated XML, specify the custom package/procedure in the XML Code field as follows: <custom package>.<custom procedure>.

- The date these changes are to take effect.

  Note: Template, XML Code and Effective Date fields in Self-Service Preference can be configured at the Business Group, HR Organization and Location levels.

The application generates either an Oracle Applications Framework (OAF)-based payslip or PDF payslip depending on the values entered in the Template and Effective Date fields:

- If both the fields are left blank, the application generates an OAF payslip.

- If you select a template and enter an effective date later than payment date, the application generates an OAF payslip.

- If you select the template and enter an effective date earlier than or equal to payment date, the application generates a PDF payslip.

- If you do not select a template and enter any date within the Effective Date, the application generates an OAF payslip.

- If you select the template but do not enter an effective date, the application generates a PDF payslip.

8. **Payslip Employer Address** – Select either GRE/Legal Entity Address or HR Organization Address (default) for display on the payslip.

   Note: You can configure this segment only at Business Group level.

   For Canada only – Both the OAF and PDF payslips display the HR Organization as the Employer Address.

9. **Display Payslip GRE Addr From** – If you selected GRE/Legal Entity Address for the Payslip Employer Address field, select the effective date after which the GRE address displays on the payslip.

   Note: You can configure this segment only at Business Group level.

   For Canada only – This field is not applicable.

10. **Specify the Offset Criteria** – Select either Payslip View Date or Date Paid to

configure the date to be used for displaying Online Payslips.. If this field is left blank or Payslip View Date is selected then the online payslip will be displayed based on the Payslip View Date defined for the payroll period. If Date Paid is selected then the payslip will be displayed based on the Date Paid of the payroll run.

> **Note:** By default, Payslip View Date – Check Date for any period will be equal to the Payslip offset defined for the payroll. However, if the user manually changes these dates for any period, then the Payslip Offset for that period will be considered as the Payslip View Date – Check Date and not the Offset defined for the Payroll.
>
> Further, if the Payslip View Date and/or the Payslip Offset is set to null, then all payslips (prior, current and future) will be available to the employee. (By default, the Payslip Offset is set to zero when creating the Payroll definition.)

11. Save your work.

Entering Reporting Information for an HR Organization or a Company Cost Center

Use the Reporting Information window to enter information that can be used when reporting on the organization.

If you want to enter managers for a number of organizations, or want to see an historical record of the managers for an organization, then you can use the Organization Manager Relationship window. See: Selecting and Viewing Managers for Organizations, page 2-60

To enter reporting information:

1. Query the Company Cost Center in the Organization window, if it does not already appear there. In the Organization Classifications region, select Company Cost Center, choose the Others button, and select GL Company Cost Center Information.

2. Click in the field of the Additional Organization Information window to open the GL Company Cost Center Information window.

3. Enter a reporting name. This could be a short name that enables you to easily identify the organization in a report.

4. Select the manager of the cost center. The list of people consists of all active employees from your business group. If the HR: Cross Business Group profile option is set to yes, then it includes employees from all your business groups.

Note: If you are using management reporting in DBI, then you must enter a manager.

5. Enter a start date for the relationship, and an end date if required.

HR Organizations: Entering US Federal Reporting Information

For each organization that you create, you may capture an OCT Organizational Title as well as the physical address or hierarchical representation. The OCT Organization's Title appears on the Organizational Component Translation (OCT) Report. The organization's address or position's location consists of one or more lines of address. This information appears on the Request for Personnel (RPA) in the Name and Location of the Position's Organization block.

Use the Organization Description window.

To enter US Federal reporting information:

1. In the Organization window, query the HR Organization if it does not already appear there. In the Organization Classifications region, select HR Organizations, choose Others, and select US Federal Org Information.

2. Click in the Additional Information window to display the segments of the US Federal Org Report Info flexfield.

3. In the Agency/Subelement field, choose the Agency/Subelement code that will be reported on the OCT report for this organization.

4. Enter the OPM Organizational Component (the organization field that occupies positions three through twenty on the OCT Report).

5. In Org Info Line 1 through Org Info Line 6, enter the organization's address that will appear on lines 1 through 6 of the RPA's Location of Position's Organization.

6. In the OCT Organizational Title field, the application automatically enters the name you defined for the organization in the Organization window.

HR Organizations: Entering Parent Organizations

After you set up organization hierarchies, use the Parent Organization window to place a subordinate organization in hierarchies by naming its immediate parent in each hierarchy.

To enter a parent organization:

1. In the Organization window, query the HR Organization if it does not already appear there. In the Organization Classifications region, select HR Organization, choose Others, and select Parent Organization to open the Parent Organization window.

2. Select the hierarchy name.

3. Select the name of the parent organization to which the HR Organization is subordinate in this hierarchy.

4. To enter the HR Organization in another hierarchy, repeat steps 2 and 3.

HR Organizations: Entering a Work Schedule

Work schedules show the number of working hours scheduled each day of the week for employees, starting with Monday. For example, for an employee who works 7 hours and 45 minutes each day Sunday through Thursday, with Friday and Saturday off, the work schedule is: 775-775-775-775-0-0-775.

Oracle Payroll uses work schedules to prorate pay for employees who do not submit timecards. The startup data you receive with Oracle Payroll includes several work schedules in common use, entered in the table COMPANY WORK SCHEDULES.

To select a work schedule for an HR Organization:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select HR Organization, choose the Others button, and select Work Schedule.

2. Click in the field in the Additional Organization Information window to open the Work Schedule window.

3. Select the default work schedule for the organization.

   You can override this default for individual employees on their assignments.

   If the work schedule you need is not on the list, go to the Table Structure window, query the table COMPANY WORK SCHEDULES, and enter the new work schedule.

Entering GL Company Cost Center Information for a Company Cost Center

Use the GL Company Cost Center window to enter information about the company or cost center in Oracle General Ledger that the organization represents. Liaise with your Financials implementation team to get this information.

Oracle HRMS may default this information automatically if it is set up to generate organizations in HRMS whenever a cost center is defined in GL.

Once your company cost center information has been set up then you must not change it.

To define GL Company Cost Center Information:

1. Query the company cost center in the Organization window, if it does not already appear there. In the Organization Classifications region, select Company Cost Center, choose the Others button, and select GL Company Cost Center Information.

2. Click in the field of the Additional Organization Information window to open the GL Company Cost Center Information window.

3. Select the company value set that validates the company segment in your GL flexfield and the GL company name for the organization.

   Note: If you are defining an organization that represents a company in GL do not complete any further fields and save your work.

4. Select the cost center value set that validates the cost center segment in your GL flexfield and the GL cost center name for the organization.

5. Save your work.

Entering Representative Body Information

You use the Representative Body Information window to record details about organizations classified as a representative body; for example, jurisdiction and duration of mandate.

To enter Representative Body Information:

1. Select the Job Group associated with the representative body.

   Note: You cannot associate a representative body with the default HR Job Group.

2. Select the body's jurisdiction; for example, fire wardens or health and safety issues. This list is maintained using the JURISDICTION lookup type

3. Enter the duration of the body's mandate and select the units (for example, years).

4. Select the body's method of funding; for example, employer funded, employee funded, or joint funded. This list is maintained using the FUNDING_METHOD lookup type.

5. Enter the maximum number of seats.

   Note: The maximum number of seats for a constituency must not exceed the total number of seats available for the representative body.

6. Save your work.

   Warning: Once you have attached roles to a representative body, you must *not* change the Job Group associated with the representative body, as this may lead to errors in the operating of the system.

Entering Constituency Information for a Representative Body

You can assign constituencies to a representative body in the Constituency window.

To enter constituency information for a representative body:

1. Select a constituency.

2. Enter the number of seats.

   Note: The number of seats allocated to a constituency must not exceed the maximum number of seats for its representative body.

3. Select a voting method.

4. Save your work.

Entering Organization Hierarchy Information for Constituencies

Enter organization hierarchy information for the constituency in the Organization window. You can control which people to include or exclude in the constituency by indicating a starting node.

To enter organization hierarchy information:

1. Select organization hierarchy from the Others window.
2. Select the organization hierarchy.
3. Enter the hierarchy starting node.
4. Include or exclude the organization hierarchy from the constituency in the selection field.
5. Save your work

Entering Location Information for Constituencies

Enter a location for the constituency from the Organization window.

To enter a location:

1. Select Location from the Others window.
2. Select a valid location.
3. Include or exclude the location from the constituency in the selection field.
4. Save your work.

Entering Organization Information for Constituencies

Enter an organization for the constituency from the Organization window.

To enter an organization:

1. Select organization from the Others window.
2. Select the organization.
3. Include or exclude the organization from the constituency in the selection field.
4. Save your work.

Entering Grade Information for Constituencies

Enter a grade for the constituency in the Organization window.

To enter additional grade information:

1. Select grade from the Others window.
2. Select the grade.
3. Include or exclude the grade from the constituency in the selection field.
4. Save your work.

Entering Bargaining Unit Information for Constituencies

Enter a bargaining unit for the constituency from the Organization window.

To enter additional bargaining unit information:

1. Select bargaining unit from the Others window.
2. Select the bargaining unit.
3. Include or exclude the bargaining unit from the constituency in the selection field.
4. Save your work.

Entering Job Information for Constituencies

Enter job information for the constituency from the Organization window.

To enter additional job information:

1. Select job from the Others window.
2. Select the job.
3. Include or exclude the job from the constituency in the selection field.
4. Save your work.

Entering Collective Agreement Grade Information for Constituencies

Enter a collective agreement grade for the constituency from the Organization window.

To enter additional collective agreement grade information:

1. Select collective agreement grades from the Others window.

2. Select the grade.

3. Include or exclude the grade from the constituency in the selection field.

4. Save your work.

Entering Trade Union Information for a Bargaining Association

Use the Trade Union Information window to record further information about your bargaining association if it is a trade union.

To enter trade union information for a bargaining association:

1. Query the bargaining association in the organizations window if it does not already appear there. In the Organization Classifications region, select Bargaining Association, choose the Others button.

2. Click in a field of the Additional Organization Information window to open the Trade Union Information window.

3. Enter an employer reference and a trade union reference. These could be numbers to be used in an Electronic Data Interchange.

4. Save your work

Entering Additional Information for a Professional Body

Use the Professional Body Info window to define details for a professional body.

To define professional body information:

1. Query the professional body in the Organization window, if it does not already appear there. In the Organization Classifications region, select Professional Body Information and choose the Others button.

2. Click in the field of the Additional Organization Information window to open the Professional Body Info. window.

3. Select the user defined table that should be used when calculating subscription rates for this professional body.

4. Enter the date upon which subscriptions to this body are to be reviewed.

5. Save your work.

Entering Related Organizations Information for an HR Organization

Use the Related Organizations information type to associate an operating unit to an HR organization. If you use a multi-org application, then the operating unit you select here becomes the operating unit for workers assigned to the HR organization.

> **Tip:** If you use the Multi-Org Access Control (MOAC) feature for a product that integrates with Oracle HRMS, then you can associate an operating unit to every HR organization in your enterprise using Web ADI. MOAC is a key feature in Oracle Applications that enables you to access multiple operating units from a single application responsibility. For more information on MOAC, see: Multiple Organizations Overview, *Oracle HRMS Implementation Guide*
>
> See: Data Download and Upload Using Web ADI Overview, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

To enter related organizations information:

1. Query the HR Organization in the Organization window if it does not already appear there. In the Organization Classifications region, select HR Organizations, choose Others, and select Related Organizations.

2. Click in the Additional Information window to open the Related Organizations Information window.

3. Select an operating unit to associate to the HR organization.

Running the Change Person Numbering to Automatic Process

Use this process to change the method of number generation for your employees, applicants or contingent workers from manual to automatic. This process applies to your current business group.

Run the Change Person Numbering to Automatic process from the Submit Request window.

To run the change person numbering to automatic process:

1. Select the Change Person Numbering to Automatic process in the Request Name field.

2. Click in the Parameters field if it does not automatically open.

3. Select the person type that you want the method to change from manual number

generation to automatic.

4. Choose OK and then Submit.

   After the process has run, the first automatic number assigned to a person is one higher than the maximum number already in use.

Running the Global Sequencing for Person Number Generation Process

You use this process to change the method of number generation for your employees, applicants, or contingent workers from automatic to global sequencing.

Run the Global Sequencing for Person Number Generation Process from the Submit Request window.

To run the global sequencing for person number generation process:

1. Select the Change automatic person number generation to global sequencing process in the Request Name field.

2. Click in the parameters field if it does not automatically open.

3. Select the person type that you want the method to change from automatic to global sequencing.

4. Choose OK and then Submit.

   After the process has run, the first number assigned to a person is part of a global sequence across multiple business groups.

Selecting and Viewing Managers for Organizations

Use the Organization Manager Relationship window to assign managers to organizations. The primary reason for doing this is for reporting purposes, for example, if you are using management reporting in DBI.

You can only assign managers to organizations that have a classification that uses the Reporting Information information type, for example HR Organizations.

You can also use this window to view a history of managers for an organization.

> **Note:** The list of organizations and employees you can select is dependant on the HR: Cross Business Group profile option

To select managers for an organization:

1. Select the organization for which you want to enter a manager in the Organization

Manager Details region.

2. Select the manager for the organization and enter start and end dates, if appropriate.

   Note that you can have only one current manager for an organization.

3. Save your work.

To view managers for an organization:

1. Select the organization or the manager that you want to query.

2. If you have selected a manager and want to show all the organizations to which that person *and* all his direct reports are managers, then select the Show the manager and direct reports check box. If you do not select the check box, then the query returns only the organizations to which the person you have selected is a manager.

3. Indicate the timeframe for which you want to view the results and choose the Find button. The results of your query are displayed in the Organization Manager Details region.

   If your security profile allows you to see the manager but not the organization, or the organization but not the manager, you are able to view the organization manager record but not update it.

Locations

Locations

In Oracle HRMS, you set up each physical site where your employees work as a separate *location*.

- **Global locations**: These are available in all Business Groups.
- **Business Group locations**: These can only be used in one Business Group.

Similarly, you enter the addresses of external organizations that you want to maintain in your system, such as employment agencies, tax authorities, and benefits carriers. When setting up internal or external organizations, you pick from a list of these locations.

This approach has these advantages:

- You enter information about each location only once, thereby saving data entry time.
- Central maintenance of locations ensures consistency of address standards.
- Your work sites exist as separate structures identifiable for reporting purposes, and for use in the rules that determine employee eligibility for various types of compensation and benefits.

Duty Stations and Locations

The location of an employee's position or Duty Station determines that person's Locality Pay. As a result, each location associated with a position's organization has an associated Duty Station. When you create a Location, you enter the Duty Station information as part of the Location Extra Information.

See: Setting up Locations, page 2-62, Duty Station Changes, page 2-65

Setting Up Locations

Locations are shared across Business Groups in HRMS and with two other Oracle applications: Inventory and Purchasing. HRMS does not use some of the fields in the Location window. These fields are disabled for HRMS users. For example, the Legal Address check box is read-only and supports future functionality in Oracle Financials.

Enter location addresses in the Location window.

For information about Oracle Purchasing locations see: Defining Locations, *Oracle*

Purchasing User's Guide.

To enter a work location and its address:

1. Enter the name of the location, and a description if required.

   To simplify Duty Station conversions and ensure that the Duty Station code appears as the Location name in the List of Values for the Organization and Position windows, use the Federal GEO Location code as the Location name

   > **Note:** You cannot use the same Location Name twice. If you are creating a new Location for one that exists, enter a new name. You can enter a variation of the original one, for example, by adding another number, letter, or date to it.

2. Check the Global Site check box if you are using the Federal GEO Location code as the Location name.

   Uncheck the Global Site check box if you want the location to only be available within the default Business Group of your current responsibility. Accept the default if you want the location to be a global location and therefore available to all Business Groups.

   If you are setting up a global location, the location name must be unique across all Business Groups.

   If you are setting up a location for one Business Group, the location name must be unique within that Business Group and all global locations, but does not have to be unique across all Business Groups.

   > **Note:** You cannot amend the Global check box once you have set up your location.

3. Select a national address style from the list. A window opens with the address format for the selected country.

4. Enter address information in this window and choose OK.

   > **Note:** Default address styles are predefined for many countries. You can add address styles for other countries, if required.

5. Select a time zone if you want to associate a time zone with the location.

   > **Note:** When you select a time zone, ensure that it corresponds to the location's address.

6. Choose US Federal Location Info Extra Information. Choose the Duty Station from the List of Values.

   The Duty Station list contains over 47,000 values. You may want to restrict the list before displaying (enter a few of the numbers for the duty station code followed by a percent sign).

   > **Note:** If you entered the Federal GEO Location code as the Location Name then you must select the same Federal GEO Location code in the US Federal Location Extra Information.

7. Save your location.

Making Locations Inactive

Making a location inactive prevents users from selecting it.

To remove an address from the Location list:

1. Enter an inactive date from which the location is no longer in use in your organization.

   You can delete locations that have not been used. If a location is still in use, but you do not want it to be selected today or in the future, enter an inactive date

Duty Stations

Duty Station Changes

The Office of Personnel Management (OPM) maintains and reviews the list of Duty Stations. The OPM periodically issues updated lists of:

- New Duty Stations
- Terminated Duty Stations
- Changes to existing Duty Station codes
- Changes to existing Duty Station descriptions

When you receive Duty Station changes from OPM, you can manually update the Duty Station information using the Duty Station federal maintenance window or wait until you install the most recent product update that contains the legislative updates. After making the necessary manual changes or installing the latest legislative updates, you can use the Location Occupancy Report and Duty Station Conversion process to make necessary changes to employee records.

You can use the Location Occupancy Report to list all employees who currently or previously occupied a Location. This report:

- Enables you to determine who is entitled to a Locality Payment Adjustment

  The report lists the names, social security numbers, and dates during which an employee occupied a location and locality pay area.

- Identifies employees in a Location that OPM terminated without specifying a new Location.

The Duty Station Conversion process applies only to OPM-mandated Duty Station changes. The process:

- Moves employees from an old to a new location
- Updates the employees assignment records
- Updates position records, both occupied and vacant
- Updates organization location information

See: Processing Duty Station Conversions, page 2-66, Changing Locality Pay and Duty Stations, page 2-69, Maintaining Duty Station Information, page 2-70, Setting Up Locations, page 2-62

Processing Duty Station Conversions

The Duty Station Conversion process applies only to OPM-mandated Duty Station changes.

You use the Duty Station federal maintenance form to manually update Duty Station information released by OPM. After updating the information, you can use the Duty Conversion process to move employees between two existing locations or between an old location and a new location that you have created.

See: Setting up a Location, page 2-62, Maintaining Duty Station Information, page 2-70

When you run the Duty Station Conversion process, the application moves employees to the designated location and updates their assignment, position, and organization information. The Duty Station Conversion process does not process records that result in a change in Locality Pay Areas. By running the Location Occupancy Report, you can determine if any employees have occupied a specific Duty Station.

See: Changing Locality Pay and Duty Station, page 2-69

> **Note:** To simplify Duty Station conversions and ensure that the Duty Station code appears as the Location name in the product's List of Values, assign a unique Duty Station code to each Location and use the Duty Station code as the Duty Station Name.

To run the Duty Station Conversion process:

1. From the Concurrent Manager, choose Duty Station Conversion.
2. In the Parameters dialog box, enter the following information:
   - In the Old Location Name field, choose the Location Name (the Location from which the employees are moving).
   - In the New Location Name field, choose the Location Name (the Location to which the employees are moving).
3. Choose OK to accept the parameters.
4. Choose Submit to run the process.

Resulting Updates

The Duty Station Conversion process:

- Moves employees to the new location, changing the employee's Assignment Location

- Updates the employee's position with the new location record and then displays the new location in the Position window
- Updates Organizations that contain the location
- Updates encumbered and unencumbered positions that contain the Location

Error Process

If there's an error moving an employee from one location to another, the application enters an error in the Federal Process Log.

After determining the problem from the error message, you can complete an agency specific or NOAC 792 Change in Duty Station personnel action or NOAC 895 Change in Locality Pay for that employee.

Running the Location Occupancy Report

The Location Occupancy Report lists all employees that currently or have at one time occupied a Location from the date you specify to the date the report is run. You can use this report to:

- Determine which employees should receive a Locality Payment Adjustment (NOAC 895)
- Identify employees in a Location that OPM terminated without specifying a new Location.

To run the Location Occupancy Report:

1. In the Concurrent Manager, choose the Location Occupancy Report.

   Note: Log in as a member of the business group for which you want to run the process.

2. In the Parameters dialog box, enter the following information:
   - In the From Location Name field, choose the old Location Name (the Location from which the employees are moving).
   - In the To Location Name field, choose the new Location Name (the Location to which the employees are moving).
   - In the From Date field, enter the date from which the system should start checking to determine whether an employee was assigned to the Location.

3. Choose OK to accept the parameters.
4. Enter the number of copies.
5. Select a printer for the report.
6. Choose Submit to run the process.

Processing Retroactive Duty Station Actions

Retroactive actions performed for employees with Effective Dates prior to an OPM-mandated Duty Station Conversion use the previous Duty Station information.

To process a retroactive action:

1. Choose a Request for Personnel Action from the Navigator.
2. Enter the Effective Date.
3. Query the person for whom you are processing the RPA.

   Note: If you query the person before entering the Effective Date, the RPA displays the current Location information. When you enter the Effective Date, choose Refresh to have the RPA display the previous Location information.

4. Complete the RPA.
5. Choose Update to HR.

   Upon update to the HR database, the application notifies you whether you need to convert that person's Duty Station. Choose OK to continue updating to HR or Cancel to stop the update and go back and verify your Duty Station information.

   After updating the action to the HR database, you can take the appropriate action, such as processing a Duty Station Conversion or an 792 Change in Duty Station, and review any intervening actions that may require Correction actions.

   See: Canceling or Correcting an RPA, *Workforce Sourcing, Deployment, and Talent Management Guide*

Upon update

The following table describes what the application does when you process and update a retroactive action that uses a Duty Station that changed as of January 1, 1999.

Personnel action	Upon update	Result
Retroactive Appointment	The application advises you to run the Duty Station Conversion process.	After running the Duty Station Conversion, the application updates the person's Assignment and Position information with OPM-mandated Duty Station information.
Retroactive non-Appointment where the employee does not have an Assignment record change on January 1 1999	The application advises you to run the Duty Station Conversion process.	After running the Duty Station Conversion, the application updates the person's Assignment and Position information with OPM-mandated Duty Station information.
Retroactive non-Appointment where the employee does have an Assignment record change on January 1 1999	The application advises you to process an agency-specific NOAC action.	After updating the agency-specific NOAC to the HR database, you may have to manually update the Position and Organization records, depending on your agency's procedures.

Changing Locality Pay and Duty Station

The employee's location or Duty Station determines that person's Locality Pay. For this reason, when you run the Duty Station Conversion process, the application lists employees who may require a Locality Pay Adjustment action in the Federal Process Log.

Before running the Duty Station Conversion process, you can determine which employees require a Locality Pay Adjustment personnel action by running the Location Occupancy Report. After identifying these employees, you can then take the necessary action, such as processing a NOAC 792 Change in Duty Station or a NOAC 895 Change in Locality Pay.

To process Locality Pay Adjustments:

1. Create a new location for the destination Duty Station.

   See: Setting up Locations, page 2-62

2. Run the Location Occupancy Report for each Duty Station that has a change in Locality Pay.

   See: Running the Location Occupancy Report, page 2-67

The Location Occupancy Report lists the employees' old and new Duty Station and Locality Pay Area.

3. For those employees whose Locality Pay Area involves a change in Locality Pay, process a NOAC 792 Change in Duty Station or a NOAC 895 Change in Locality Pay and specifying the Locality Pay Adjustment and the new Duty Station.

Maintaining Duty Station Information

You can respond quickly to newly released OPM changes to Duty Station codes and descriptions by manually updating that information using the Duty Station federal maintenance window. The type of action (create, update, end-date) determines which fields in the window you can edit. In addition, the window is datetracked, so that you can datetrack to the date that corresponds to the dates OPM issues. For example, when you create a Duty Station, you would datetrack the window to the date OPM lists as the start date for the new Duty Station.

Changes to Duty Station information can impact Locality Pay calculations on existing and previous employee assignment records. To determine if employees have occupied the Duty Station, run the Location Occupancy Report and then take appropriate action, for example, by processing a Locality Pay Adjustment action for those employees.

When making changes to Duty Station information, make sure that you have entered the information as released by OPM. If you make a mistake entering the information, locate the Duty Station information that you need to correct or update, datetrack the Duty Station window, and correct the information accordingly.

To create Duty Station information:

1. Datetrack to the date OPM lists as the date on which the new Duty Station begins.

   The application enters a Start Date based on the datetracked date.

2. Enter the Code.

   The application enters the State or Country Code and the County Code.

3. Enter the Name. Use the description that OPM provides.

4. If appropriate, enter the Metropolitan Statistical Area (MSA) code.

5. If appropriate, enter the Consolidated Metropolitan Statistical Area Code (CMSA).

6. Enter the Locality Pay Area Code.

7. If appropriate, enter the LEO Pay Area Code.

8. Confirm that the Duty Station checkbox is selected. You deselect this checkbox only

if you are creating a state.

9. Save your changes.

To update Duty Station information:

1. Query the Duty Station record that you need to update.
2. Datetrack to the date from which OPM states that the change begins.
3. Enter the appropriate information in the fields.
4. Save your changes.
   - Choose Correction to update the existing record with the updated information.
   - Choose Update to end-date the existing record one day prior to the date tracked date and create a new record as of the date tracked date.

To end date Duty Station information:

1. Display the Duty Station maintenance window and query the Duty Station record that you need to end-date.
2. Datetrack to the date on which OPM states that the Duty Station ends.
3. Choose the Delete icon from the toolbar, and choose End Date if you have datetracked to the latest updated record for the Duty Station.

   Each time you update the Duty Station, the application creates a new record, so if this is not the latest updated record for the Duty Station, the application lists two other options, Next and All. Next deletes the next future record and updates the current record with the next record's end date. All deletes future records and updates the current record with the end of time.
4. You can continue making Duty Station changes to other records. When you have concluded your updates, save your changes.

Auto Orgs

Internal Organizations and Cost Centers

With the Oracle eBusiness suite of applications you can enable the automatic creation of HR organizations using the Auto Orgs functionality. If your enterprise has a close relationship between its financial structure and line management hierarchy, then this means you only have to maintain your financial structure in GL and the corresponding organizations that you need to create your line manager hierarchy are automatically generated. The application creates HR organizations corresponding to company cost center combinations that exist in your GL account combinations.

Alternatively, if your financial cost centers are different to your HR organizations, but you still want to represent your cost centers as organizations, you can enable the application to automatically create company cost center organizations. These also correspond to company cost center combinations that exist in your GL account combinations.

This functionality provides a foundation for the management reporting functionality in Daily Business Intelligence (DBI) . It enables you to take financials information, such as costs, revenues, and expenses, and consolidate it by cost center manager.

Cost Allocation Key Flexfield

When defining an HR organization, you can identify one cost center against which the payroll costs of the employees assigned to the organization should be collected. You simply select the cost center from a list in a segment of the Cost Allocation key flexfield.

For example, suppose you are defining in Oracle HRMS the organization Product Assembly, whose employee payroll costs go to the cost center Production. When entering the organization Product Assembly, you select Production from the list of cost centers in the Cost Allocation flexfield:

Cost Allocation Key Flexfield

Segment 1: Cost Center

410-Accounting

425-Production

503-Public Relations

> **Note:** If employees' costs are charged to cost centers other than those of their organizations, or if they work in an organization only part time, you can enter other cost centers, and the percentage of time to be charged to each, on their *employee assignments*. Costing information

entered for employee assignments overrides that entered for organizations.

For more information about the cost allocation key flexfield see: The Cost Allocation Key Flexfield, page 4-62

Implementing Automatic Company Cost Center Creation

Follow these steps to set up automatic creation of organizations in HRMS corresponding to company cost center combinations that exist in your GL account combinations.

See: Internal Organizations and Cost Centers, page 2-72 for more information about the relationship between GL cost centers and HR organizations.

To implement automatic company cost center creation:

You must perform these steps after you have defined your business groups but before you create any HR organizations.

1. Ensure that your GL account combinations have been set up in Oracle GL. This should have been done as part of your Oracle Financials implementation.

2. Work with your Financials implementation team to decide how your financial companies relate to your business groups. Also, you need to discuss how financial companies and cost centers relate to the internal organizations. For example, do your financial companies map to GREs? Do your cost centers map to HR organizations, and so on.

3. Define an organization for each of the companies that exist in your business group. These companies should have been set up during your Financials implementation. You can apply a classification of company cost center to either an existing, or new organization.

   See:Entering Organization Classifications, page 2-33

   Select the value set that validates the company segment in your GL accounting flexfield and select the company name for each of the company cost center organizations.

   If you are defining an organization that represents a company in GL, then do not complete the cost center fields.

   See: Entering GL Company Cost Center Information for a Company Cost Center, page 2-53

   Note: You must take care when defining your company

organizations as it influences the cost center organizations that are available to your business group.

4. Set the HR: GL Cost Center Org Classifications profile option to one of the following to define what organization classifications are created in HRMS:

   - If your financials cost centers are the same as your HR organizations, then set the profile option to HR Organizations and Company Cost Centers.

   - If your financials cost centers are different but you still want to represent your cost centers as organizations, then set the profile option to Company Cost Centers. You need to do this if you intend to use the management reporting functionality in DBI and your HR organizations are not cost centers.

   For more information on profile options see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

5. Set the GL Organization Name Format profile option. This defines the format of the names for the organizations created automatically. If you do not want to use the predefined formats you can add your own using the HR_GL_ORG_NAME_FORMAT lookup type.

   See: Defining the Name Format of Company Cost Centers, page 2-78

6. Run the one of the following:

   - If you use DBI management reporting to consolidate financials information by cost center manager, then run the Synchronize GL Company Cost Centers with HR request set.

   - If you want to generate your organizations in HRMS based on your GL structure but do not use DBI, then run the Create and Maintain Company Cost Center Organizations process.

     Note: Run the Synchronize GL Company Cost Centers with HR request set or the Create and Maintain Company Cost Center Organizations process only after you have created an organization to represent each of the financials companies that relate to your business group.

   See: Running the Synchronize GL Company Cost Centers with HR Request Set, page 2-81 and Create and Maintain Company Cost Center Organizations, page 2-82

7. Select a manager for each of the company cost centers, once you have entered the details of your workforce into your application. You must perform this step if you

are using management reporting in DBI. You can do this in one of the following ways:

- If you want to select a manager for each company cost center individually, see: Entering Reporting Information for an HR Organization or a Company Cost Center, page 2-51

- If you want to select managers for multiple company cost centers, see: Selecting and Viewing Managers for Organizations, page 2-60

8. Set the HR: Automatically Synchronize Single GL Company Cost Centers with HR profile option to Yes or No. You use this profile to indicate if new GL account code combinations are automatically reflected in HR, or whether you want to control this by running the required processes manually.

   Set the profile to Yes if you want Oracle HRMS to automatically create an organization whenever any new GL account code combinations are subsequently created in Oracle Financials. Oracle HRMS will submit the Synchronize Single GL Company Cost Center with HR process automatically for every new account code combination. You define the classifications for the organizations created by this process by setting the HR: GL Cost Center Org Classifications profile option.

   Set the profile to No if you do not want the Synchronize Single GL Company Cost Center with HR process to run automatically, but perhaps want to create all the required organizations at once. You can then run the Create and Maintain Company Cost Center Organizations and the Synchronize GL Company Cost Centers with Existing Organizations processes, or the Synchronize GL Company Cost Centers with HR request set as often as you need.

   > **Note:** If the Concurrent: Hold Requests profile option is set to Yes for your GL responsibility, then the process that creates organizations in HRMS automatically will remain on hold until you restart it.

Upgrading to Automatic Company Cost Center Creation

Follow these steps to upgrade your existing application to automatic creation of organizations in HRMS corresponding to company cost center combinations that exist in your GL account combinations.

See: Internal Organizations and Cost Centers, page 2-72 for more information about the relationship between GL cost centers and HR organizations.

To upgrade to automatic company cost center creation:

You must perform these steps after you have defined your business groups but before you create any HR organizations.

1. Ensure that your GL account combinations have been set up in Oracle GL. This should have been done as part of your Oracle Financials implementation.

2. Work with your Financials implementation team to decide how your financial companies relate to your business groups. Also, you need to discuss how financial companies and cost centers relate to the internal organizations. For example, do your financial companies map to GREs? Do your cost centers map to HR organizations, and so on.

3. Define an organization for each of the companies that exist in your business group. These companies should have been set up during your Financials implementation. You can either apply a classification of company cost center to an existing, or new organization.

   See: Entering Organization Classifications, page 2-33

   Select the value set that validates the company segment in your GL accounting flexfield and select the company name for each of the company cost center organizations.

   If you are defining an organization that represents a company in GL, then do not complete the cost center fields.

   See: Entering GL Company Cost Center Information for a Company Cost Center, page 2-53

   > **Note:** You must take care when defining your company organizations as it influences the cost center organizations that are available to your business group.

4. Ensure that the HR: Data Exchange Directory profile option has been set. This defines the directory into which the Export GL Organizations process writes tab delimited files. These files are subsequently read by the Upload GL Company Cost Center Information request set.

5. Ensure that your database administrator has added the directory path defined in the previous step to the init.ora file, using the utl_file_dir parameter.

6. Set the GL Organization Name Format profile option. This defines the format of the names for the organizations created automatically. If you do not want to use the predefined formats you can add your own using the HR_GL_ORG_NAME_FORMAT lookup type.

   See: Defining the Name Format of Company Cost Centers, page 2-78

7. Run the Export GL Company Cost Centers process.

Note: Run the Export GL Company Cost Centers process only after you have created an organization to represent each of the financials companies that relate to your business group.

See: Running the Export GL Company Cost Centers Process, page 2-79

8. Amend the tab delimited file produced by the Export GL Company Cost Centers process to map your cost centers to existing organizations.

   See: Running the Export GL Company Cost Centers Process, page 2-79

9. Upload the amended tab delimited file using the Upload Company Cost Center Information request set.

   See: Running the Upload Company Cost Center Information Request Set, page 2-80

10. Check the Exception Report generated by the Upload Company Cost Center Information request set to ensure that all company cost centers classifications have been created successfully.

    See: Running the Upload Company Cost Center Information Request Set, page 2-80

11. Set the HR: GL Cost Center Org Classifications profile option to one of the following to define what organization classifications are created in HRMS:

    - If your financials cost centers are the same as your HR organizations, then set the profile option to HR Organization and Company Cost Center.

    - If your financials cost centers are different but you still want to represent your cost centers as organizations, then set the profile option to Company Cost Center. You need to do this if you intend to use the management reporting functionality in DBI and your HR organizations are not cost centers.

    For more information on profile options see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

12. Run the Synchronize GL Company Cost Centers with Existing Organizations process.

    See: Running the Synchronize GL Company Cost Centers with Existing Organizations Process, page 2-82

13. Set the HR: Automatically Synchronize Single GL Company Cost Centers with HR profile option to Yes or No. You use this profile to indicate if new GL account code combinations are automatically reflected in HR, or whether you want to control this by running the required processes manually.

    Set the profile to Yes if you want Oracle HRMS to automatically create an organization whenever any new GL account code combinations are subsequently

created in Oracle Financials. Oracle HRMS will submit the Synchronize Single GL Company Cost Center with HR process automatically for every new account code combination. You define the classifications for the organizations created by this process by setting the HR: GL Cost Center Org Classifications profile option.

Set the profile to No if you do not want the Synchronize Single GL Company Cost Center with HR process to run automatically, but perhaps want to create all the required organizations at once. You can then run the Create and Maintain Company Cost Center Organizations and the Synchronize GL Company Cost Centers with Existing Organizations processes, or the Synchronize GL Company Cost Centers with HR request set as often as you need.

> **Note:** If the Concurrent: Hold Requests profile option is set to Yes for your GL responsibility, then the process that creates organizations in HRMS automatically will remain on hold until you restart it.

Defining the Name Format of Company Cost Centers

You must set up the HR: GL Organization Name Format profile option if you want your application to create organizations in HRMS based on cost centers in GL automatically. This profile defines how the name of the organization in HRMS is generated.

The options available in this profile option are held in the HR_GL_ORG_NAME_FORMAT lookup type. You can add your own formats to this lookup if required.

Use the Application Utilities Lookups window to define organization name formats.

To define the company cost center name format:

1. Query the HR_GL_ORG_NAME_FORMAT lookup type.
2. Add a new record.
3. Construct a name format in the Code column using the following codes:
   - $COC - Company Code
   - $CCC - Cost Center Code
   - $CON - Company Name
   - $CCN - Cost Center Name

   Any other characters included in the code are used as delimiters. For example, if you want your organization names to be constructed using the cost center name

followed by the company code and separated with a hyphen, then you would enter $CCN-$COC.

4. Enter a meaning and, optionally, a description for the lookup code.

5. Save your work.

What Next?

You can now set the HR: GL Organization Name Format profile option at Site level in the System Profile Values window.

Running the Export GL Company Cost Centers Process

Run this process if you are converting your existing setup to use automatic cost center creation.

> **Note:** You can only use the export functionality if you have the full version of Oracle HRMS installed.

The process is run for your current business group and writes information about GL company cost center combinations for companies that you have previously defined for your business group to a tab delimited file. It creates a record in the file for each unique company cost center combination that has been defined in GL.

To identify the company and cost center segments, the process looks to see which segments have had certain qualifiers applied. The company segment is identified by the Balancing Segment qualifier, and the cost center is identified by the Cost Center Segment qualifier.

> **Note:** You need to ensure that your Financials implementation team has set both of these qualifiers for the GL account combinations that are being mapped to organizations in HR.

The process only includes company and cost center combinations that have not already been linked to an organization.

Run the Export GL Company Cost Centers process in the Submit requests window. You can only have one version of this process running at any one time.

To run the Export GL Company Cost Centers process:

1. Select Export GL Company Cost Centers in the Name field.

2. Select the chart of accounts for which you want to run the process.

3. Choose the Submit button to run the process.

The process produces two files and puts them in the directory defined by the HR: Data Exchange Directory profile option. The files produced are:

- GLCC_*business group name_business group id*.hdr

  This header file defines the upload parameters used by the upload process. Do not edit this file.

- GLCC_*business group name._business group id*.txt

  This file contains the organization information that you can edit.

What Next?

You can use a spreadsheet or text editor to amend the GLCC_*business group name_ business group id*.txt file to map company and cost center combinations to existing organizations in HRMS. To do this, replace the suggested organization name with the exact name of the existing organization in the organization_name column. Do not make any amendments to any other columns.

> **Note:** If you are using Microsoft Excel to edit the tab delimited file you must make sure the settings are correct when importing the file using the Text Import wizard. Select Tab as the delimiter and ensure that each column that contains IDs or Dates is given a Column Data Format of Text. This is to ensure that numbers that begin with zeros are imported correctly and that dates are imported with the correct format. The columns you need to set are:
>
> - costcenter_id
> - company_id
> - effective_date

Running the Upload GL Company Cost Center Information Request Set

Run the Upload GL Company Cost Center Information request set to upload the amended version of the exported file created using the Export GL Company Cost Centers process.

> **Note:** You can only use the Upload functionality if you have the full version of Oracle HRMS installed.

By uploading the file you map company and cost center combinations to existing organizations. A classification of company cost center is added to the each existing organization.

Note: Ensure that the .txt filename you have amended is exactly the same, including case, as that entered in the header file.

Run the Upload GL Company Cost Center Information request set in the Submit Request Set window.

To run the Upload GL Company Cost Center Information request set:

1. Select Upload GL Company Cost Center Information in the Request Set field.
2. Click in the Parameters field to display the Parameters window.
3. Enter the path for the header file created during the export procedure.
4. Choose the submit button to run the request set.

   The processes that make up the request set are now run in turn.

What Next?

Once the DataPump Exceptions Report process has completed you should check the output. This details any organizations that have not been uploaded correctly, for example if the organization name entered into the spreadsheet does not exist, or if an organization specified already has a company cost center classification.

If the process has produced some exceptions, then you must do the following:

- Correct the errors
- Delete the rows that have uploaded successfully from the GLCC_*business group name_business group id*.txt file
- Run the Upload GL Company Cost Center Information request set again

Running the Synchronize GL Company Cost Centers with HR Request Set

Run the Synchronize GL Company Cost Centers with HR request set when setting up your enterprise to create organizations that correspond to your cost centers in GL automatically if you use DBI to report on financials information.

The request set contains the following concurrent processes:

- Create and Maintain Company Cost Center Organizations, page 2-82
- Synchronize GL Company Cost Centers with Existing Organizations, page 2-83

If you have set the HR: Automatically Synchronize Single GL Company Cost Centers with HR profile option to No run this request set, or its constituent parts, periodically.

- If you create new GL account code combinations often and use DBI management reporting to consolidate financials information by cost center manager, then run this request set regularly. Alternatively, if your cost center structure is quite static, then to keep your processing time to a minimum you can run the Synchronize GL Company Cost Centers with Existing Organizations process regularly, and run the Synchronize GL Company Cost Centers with HR request set less frequently. How often you run these processes depends on how often you create new cost center codes.

- If you want to generate your organizations in HRMS based on your GL structure but do not use DBI, then you only need to run the Create and Maintain Company Cost Center Organizations process as often as you required.

Run the Synchronize GL Company Cost Centers with HR request set in the Submit Request Set window. You can only run one version of these processes at a time.

To run the Synchronize GL Company Cost Centers with HR request set:

1. Select Synchronize GL Company Cost Centers with HR in the Name field.

2. Select the chart of accounts for which you want to run the request set.

3. Click Submit to run the request set.

Running the Create and Maintain Company Cost Center Organizations Process

This process creates company cost center organizations for the companies in your business group. It creates an organization for each unique GL account code combination that is defined in GL, if an organization does not already exist with the same company code, company value set, cost center code, and cost center value set. You define which classifications to assign to the organization using the HR: GL Cost Center Org Classifications profile option.

The process sets the start date of the new organization to the start date of the company or cost center value set, whichever is earlier.

The process sets the end date of the new organization to the end date of the company or cost center value set, whichever is later. If no end date has been entered for either value set, then the process does not define an end date for the new organization.

Secondly the process checks for a match on organization names. If a name matches the format defined in the HR: GL Organization Name Format profile option, then the process adds any missing classifications to the organization.

Note: Run the Create and Maintain Company Cost Center

Organizations process only after you create an organization to represent each of the financial companies that relate to your business group.

Additionally, you can use the Create and Maintain Company Cost Center Organizations process to update the names, and start and end dates of existing organizations created using Auto Orgs to reflect changes in the company or cost center value set.

Run the Create and Maintain Company Cost Center Organizations process in the Submit Request window. You can only run one version of this process at a time.

Note: This process is also included in the Synchronize GL Company Cost Centers with HR request set. See:Running the Synchronize GL Company Cost Centers with HR request set., page 2-81

To run the Create and Maintain Company Cost Center Organizations process:

1. Select Create and Maintain Company Cost Center Organizations in the name field.
2. Select the chart of accounts for which you want to run the process.
3. Select a company if you want to run the process for one company only. If you do not specify a company the process generates company cost center organizations for each company organization in your business group that has the same company value set as that which is used to validate the balancing segment value in the chosen chart of accounts.
4. Indicate whether you want to synchronize existing organization names. Select Yes and the process updates organization names to reflect any changes to the company description or cost center description in the company or cost center value sets, or to the HR: GL Organization Name Format profile option.
5. Indicate whether you want to synchronize start and end dates for existing organizations. Select Yes and the process updates the start and end dates of organizations to reflect any changes to the values in the company or cost center value sets.
6. Click Submit to run the process.

Running the Synchronize GL Company Cost Centers with Existing Organizations Process

This process links existing company cost center organizations to GL account

combinations. The process checks for a match on company code, company value set, cost center code, and cost center value set.

To identify the company and cost center segments, the process looks to see which segments have had certain qualifiers applied. The Balancing Segment qualifier identifies the company segment, and the Cost Center Segment qualifier identifies the cost center, in the GL Accounting flexfield.

> **Note:** Ensure that your Financials implementation team has set both of these qualifiers for the GL account combinations that are being mapped to organizations in HR.

The process only includes company and cost center combinations that are not already linked to an organization. Once you link an organization to a GL account combination, then you cannot link the GL account to a different organization, and you cannot update the link.

Run the Synchronize GL Company Cost Centers with existing Organizations process in the Submit Request window. You can only run one version of this process at a time.

> **Note:** This process is also included in the Synchronize GL Company Cost Centers with HR request set. See: Running the Synchronize GL Company Cost Centers with HR request set., page 2-81

To run the Synchronize GL Company Cost Centers with Existing Organizations process:

1. Select Synchronize GL Company Cost Centers with Existing Organizations in the name field.
2. Select the chart of accounts for which you want to run the process.
3. Click Submit to run the process.

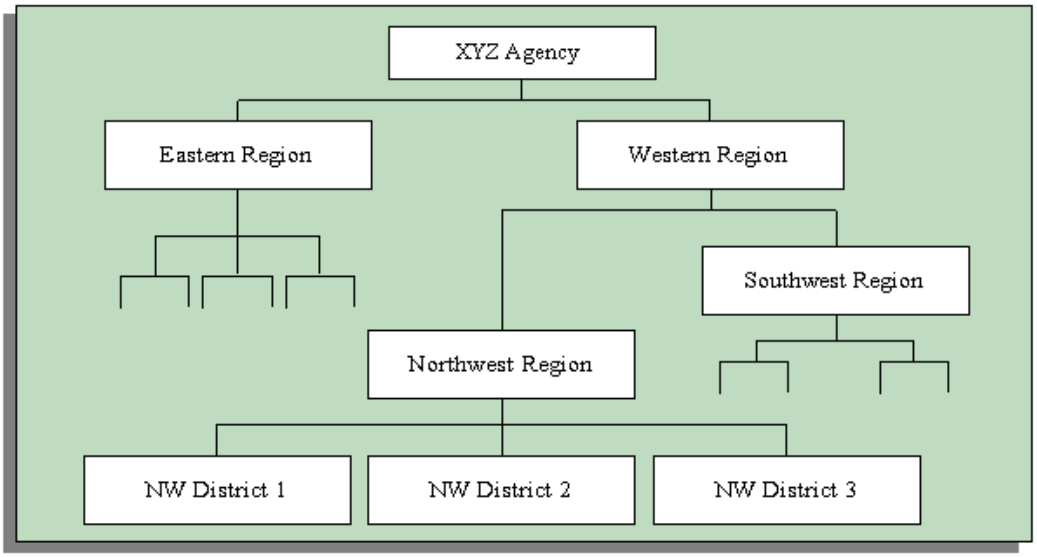
Organization Hierarchies

Organization Hierarchies

Organization hierarchies show reporting lines and other hierarchical relationships in your agency.

You set up a *primary reporting hierarchy* reflecting the main reporting lines in your agency, as established in an organization chart. Below is an example of an organization chart showing the reporting lines of a single agency.

Chart Showing Primary Reporting Lines



Multiple Hierarchies

In addition to the primary reporting hierarchy, you can set up as many other organization hierarchies as you need.

Hierarchies for Matrix Management

Your organization may have a matrix management structure in which organizations have more than one reporting line. You can set up additional hierarchies to reflect secondary reporting relationships within your organization.

Security Hierarchies

As well as constructing hierarchies to reflect reporting lines, you use hierarchies to

control access to information. For example, in a decentralized organization you might want to give each regional manager access to the records of the employees in the organizations in his or her region.

Hierarchies for Reporting

When you run some of the standard reports, you can specify an organization hierarchy to determine which organizations and employees the report covers. You can also use this approach in your own standard or ad hoc reports. You can create additional organization hierarchies just for analysis and inquiry purposes.

Organizational Change and Version Control

Changing your hierarchies to reflect simple changes in reporting lines is easy. You create a new *version* of your existing hierarchy and modify parts of its structure. Oracle HRMS retains earlier versions of hierarchies for historical information.

However, when you experience a major restructuring, it is often best to create new work structures, including new organizations and reporting lines.

> **Tip:** You can create future-dated versions of your organization structures and use these to prepare for reorganization in advance. You retain previous versions of your hierarchies for historical information.

If you want to read more information about dated information and hierarchy versions, see Managing Change Over Time, *Oracle HRMS Enterprise and Workforce Management Guide*

Global Organization Hierarchies

Global organization hierarchies enable you to work on organizations in multiple business groups and provide standard functionality for global reporting. In a multinational enterprise with organizations in multiple business groups, for example, global hierarchies enable you to set up a single global reporting hierarchy for management or approvals. In other words, you maintain only one hierarchy instead of several.

A global hierarchy can contain organizations from any business group on your database. By associating a global organization hierarchy with a global security profile you can create a security hierarchy that gives users access to organizations across business groups.

For more information about security profiles, see Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

If you use the Oracle HRMS forms interface, then you cannot access data across business groups using one responsibility, even if you associate a global security profile to your responsibility. Your access is limited to organizations in the business group

defined in the HR:Business Group profile option.

Establishment Hierarchies

The U.S. Equal Employment Opportunity Commission (EEOC) defines an establishment as an economic unit, such as a factory, office, store, or mine, that produces goods or services. Typically, the establishment is at a single physical location and is engaged in predominantly one type of economic activity. For many EEO-related reports, you must organize employment data by establishment.

In Oracle HRMS, an establishment is a location, and you record establishment information in location EITs. For example, in the location EIT "EEO-1 Specific Data," you record the EEO-1 reporting name and unit number of the establishment. Using the Oracle HRMS generic hierarchies functionality, you can define a *hierarchy* of one or more establishments to represent your enterprise for reporting purposes. The establishment hierarchy is especially useful when you need to run reports for multiple establishments, as a single request can produce reports for multiple establishments. The establishment hierarchy you define is reusable: you can run various government-mandated reports, such as the EO Survey report, the EEO-1 reports, and the VETS-100 reports for the same establishment hierarchy.

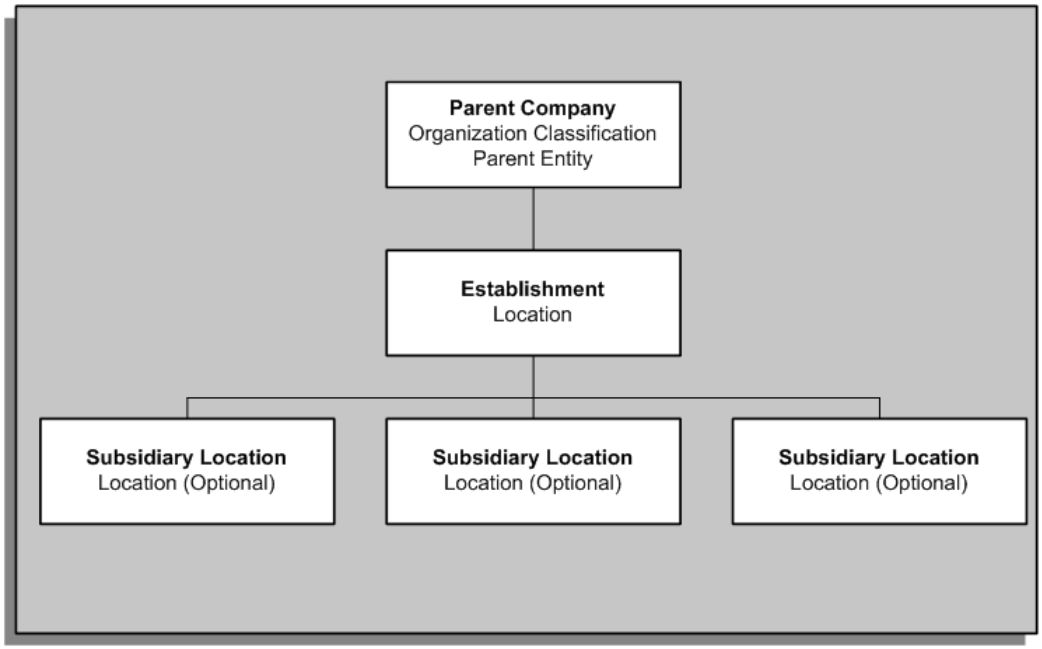
Components of the Establishment Hierarchy

In the Maintain Hierarchy Content page, you enter a name for your establishment hierarchy, and select the hierarchy type "VETS, EEO, AAP, OSHA, Multi Work Sites." For this hierarchy type, you select an organization with the classification *parent entity* as the top node in the hierarchy. You record some of the data required by U.S. government reports against the organization that is the parent entity. For example, you specify default data for establishments in the hierarchy in the EEO-1/VETS Establishment Data record of the parent entity.

To define your establishment hierarchy, you identify child nodes of the parent entity node. Immediate child nodes of the parent entity are *establishment* nodes. If all employees in your enterprise work from a single establishment, you define an establishment hierarchy with one parent entity and one establishment node. Alternatively, if your employees work from multiple establishments, you define multiple establishment nodes as child nodes of the parent entity. In a multi-establishment hierarchy, you identify one of the establishments as the headquarters establishment by updating the location EIT "EEO-1/VETS Generic Data."

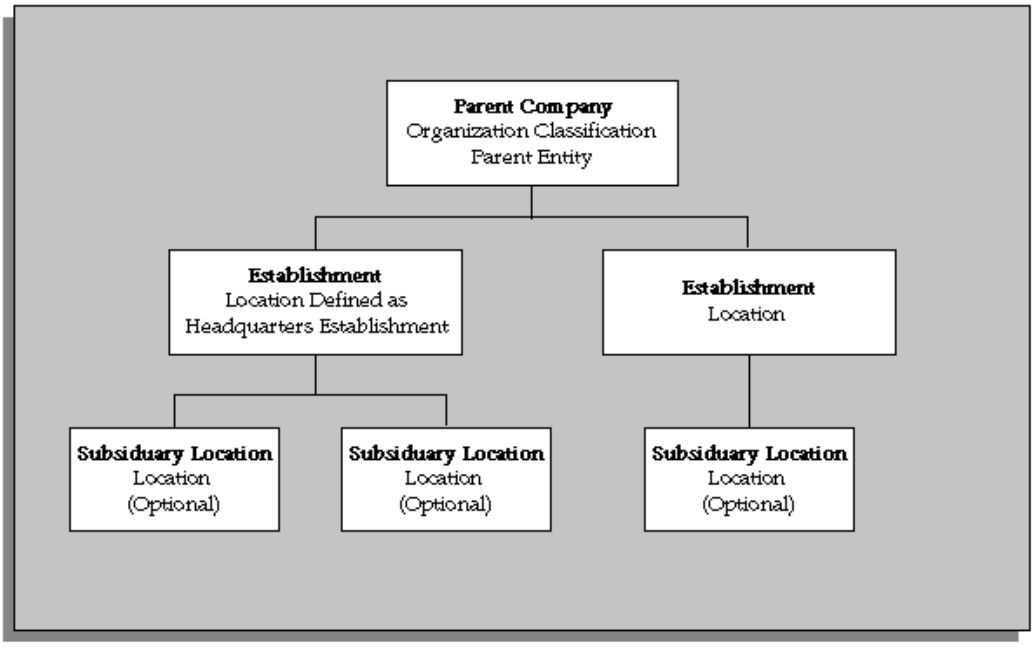
If any establishment in your hierarchy comprises more than one location, you define *location* nodes as child nodes of the establishment node. For example, you may group multiple small locations under a single establishment in your enterprise. When you run a report for the hierarchy, information from the locations (such as employee assignments associated with the location) appears in the establishment report. However, this third level of nodes (the location level) is not usually required.

Single-Establishment Hierarchy



This figure shows an establishment hierarchy comprising a parent entity with one establishment node. This establishment has three subsidiary locations that are included in reports for the establishment.

Multi-Establishment Hierarchy



This figure shows an establishment hierarchy comprising a parent entity with two establishment nodes, one of which has been identified as the headquarters establishment. Both establishments have subsidiary locations.

This hierarchy of node types, where location is a child node of the establishment node, and the establishment node is a child node of the parent entity, is enforced by the hierarchy type "Vets, EEO, AAP, OSHA, Multi Work Sites."

In most cases, there is a one-to-one relationship between an establishment and a location. In some cases, there are many locations to one establishment. You can also associate a single location with multiple establishments. If different subsidiary companies of your enterprise (for example, a sales company and a maintenance company) that you want to report on separately are based at the same physical location, you can create multiple location records with identical address data but different establishment information in the location EITs. You include these establishments in the hierarchy in the usual way so that they appear as separate establishment nodes in the establishment hierarchy.

Creating Organization Hierarchies

Create organization hierarchies to show reporting lines and other hierarchical relationships. If you want to include organizations from a single Business Group, use the Organization Hierarchy window, alternatively, use the Global Organization Hierarchy window to include organizations from any Business Group. Always define hierarchies from the top organization down.

You must define the top organization in the hierarchy, and at least one organization subordinate to it.

> **Note:** To access the Global Organizations Hierarchy window you must have a global security profile associated with your responsibility and your System Administrator must add the window to the menu.

To set up a new organization hierarchy:

1. Enter a unique name for the hierarchy, and check Primary if it is your main reporting hierarchy.
2. Save your work.
3. Enter the version number and start date for the hierarchy.

   You can copy an existing hierarchy. See: To copy an existing hierarchy, page 2-92, below.
4. Save your work.
5. Query the top organization name in the Organization block.
6. In the Subordinates block, select the immediate subordinates for the top organization.

   If you are using the Global Organization Hierarchy window, the lookup displays which Business Group each organization belongs to as organizations from different Business Groups can have the same name.
7. To add organizations below one of these immediate subordinates choose the Down Arrow button for the organization.

   The Organization block now displays the organization you selected. You can add subordinates to *this* organization. To return to the previous level, choose the Up Arrow button.

   > **Note:** The list of organizations from which you can select in the Subordinates block includes organizations that are already in the hierarchy. If you select such an organization, you will move it and all its subordinates within the hierarchy.
   >
   > See: Changing Organization Hierarchies, page 2-93

To enable position control:

1. Query the organization hierarchy in the Name field.

2. Check the Top Node Position Control Enabled checkbox to select this hierarchy as the one that operates under the position control business rules.

   You can designate only one hierarchy for position control. Any versions you create of this hierarchy are also position controlled.

3. Determine the top node for position control (the level at which position control begins):

   - To set the level at the highest organization so that position control is enabled for all organizations, it is sufficient to check the Top Node Position Control Enabled check box as in the previous step.

   - To set the level so that position control begins at a subordinate level, choose the organization in the Subordinate block and select Yes from the LOV in the Position Control Enabled field.

4. To exclude an organization that shouldn't operate under position control rules, choose the organization in the Subordinates block and select No from the LOV in the Position Control Enabled field.

   Excluding the organization automatically excludes its subordinates.

   > **Note:** If you are converting positions from a legacy system, use HR_POSITION_API before enabling position control. You do not have to approve legacy positions you create before defining position control organizations.

To change the top node for position control:

1. Query the organization hierarchy version that's position controlled.

2. Query the organization that was the previous top node in the Organization Name field.

3. Click the Up button to move the organization into the Subordinates block and select No from the LOV in the Position Control Enabled field. Excluding the organization automatically excludes its subordinates, but if subordinate organizations have a Yes value in the Position Control Enabled field, you must change them manually to No or to a blank.

4. Query the organization that will become the new top node in the Organization block.

5. Click the Up button to move the organization into the Subordinates block and select Yes from the LOV in the Position Control Enabled field.

6. Exclude subordinate organizations from position control as desired by choosing the organization in the Subordinates block and selecting No from the LOV in the Position Control Enabled field.

To create a new version of an existing hierarchy:

1. Query the name of the hierarchy.

2. In the Version field, use the Down Arrow to move through existing versions of the hierarchy until you reach a version number for which no other data appears. Enter the start datefor the new version.

   > **Note:** Overlapping versions of a hierarchy cannot exist. Whenever you enter a new version of a hierarchy, the system automatically gives an end date to the existing version. Oracle HRMS retains the records of obsolete hierarchies, so you do not lose any historical information.

   You can copy an existing hierarchy. See: To copy an existing hierarchy, page 2-92, below.

3. Query the top organization name in the Organization block.

4. In the Subordinates block, select the immediate subordinates for the top organization.

5. To add organizations below one of these immediate subordinates, choose the Down Arrow button for the organization.

   The Organization block now displays the organization you selected. You can add subordinates to *this* organization. To return to the previous level, choose the Up Arrow button.

To copy an existing hierarchy:

1. Enter or query the name and number of your new hierarchy version and choose the Copy Hierarchy button.

2. Select the name and version number of the hierarchy you want to copy.

   Details of this hierarchy then appear in the Organization and Subordinates blocks. You can change these.

Changing Organization Hierarchies

To view which organizations are in a hierarchy:

1. Query the hierarchy and version you want to view.
2. In the Organization region, enter a query on the Name field.
3. Check the Exists in Hierarchy check box and run the query. You can now scroll through the organizations currently in the hierarchy in the Name field.

To add a new organization to an existing hierarchy:

1. Query the hierarchy and version you want to change.
2. Query the parent organization for the one you are adding.
3. Select the new organization in the Subordinates block.

> **Important:** The list of organizations from which you can select in the Subordinates block includes organizations that are already in the hierarchy. If you select such an organization, you will move it and all its subordinates within the hierarchy.

To change the top organization of an existing hierarchy:

1. Query the hierarchy and version you want to change.
2. Query the new top organization.
3. Select the previous top organization in the Subordinates block.

To move an organization and all its subordinates:

1. Query the hierarchy and version you want to change.
2. Query the new parent organization for the one you want to move.
3. Select the organization to move in the Subordinates block. All the organization's subordinates are moved.

Deleting Organization Hierarchies

You cannot delete an organization hierarchy if other versions exist, or a security profile

uses it.

To delete an organization hierarchy:

1. Remove all the subordinate organizations from the hierarchy, starting at the lowest level.

2. Delete the organization hierarchy.

Running the Organization Hierarchy Report

Oracle HRMS includes a standard Organization Hierarchy Report to display the relationships between organizations in a hierarchy.

You run reports from the Submit Requests window.

To run the Organization Hierarchy Report:

1. In the Name field, select Organization Hierarchy.

2. Enter the Parameters field to open the Parameters window.

3. Enter the effective date for which you want to see the report.

4. In the Organization Structure field, select the hierarchy. If there are multiple versions, select a version.

   If the effective date lies between the version's start and end dates, the report shows information for the effective date. If it lies outside these dates, the report shows information for the start date of the version.

5. In the Parent Organization field, select the highest organization in the hierarchy that you want to see on the report.

6. Enter Yes in the Managers Shown field to see managers' names. The report includes all assignments that have a manager status in the Assignment window, at the time the report is run.

   If there are more than ten managers, you see the number of managers only.

7. Choose the Submit button.

Launching a Hierarchy Diagrammer

You edit organization or position hierarchies in the Organization Hierarchy Diagrammer window or the Position Hierarchy Diagrammer window.

Note: Before you can access the hierarchy diagrammers, a TCF SocketServer must be running. Your system administrator can set this up for you.

To launch a hierarchy diagrammer:

1. Open the Organization or Position Hierarchy window using the Diagrammer menu option. This displays a cut-down version of the Hierarchy window.

   Note: To create hierarchies containing organizations from only one business group, choose the Diagrammer Local option. To include hierarchies from more than one business group, choose the Diagrammer Global option.

2. Query the hierarchy you want to edit. If it does not yet exist, you can create a new hierarchy by:

   - Setting Up a New Hierarchy, page 2-99
   - Creating a New Version of an Existing Hierarchy, page 2-100
   - Copying an Existing Hierarchy, page 2-101

3. Choose the Open Editor button to open the Hierarchy Diagrammer window. The selected organization or position hierarchy is displayed.

   The hierarchy diagrammer is divided into three regions:

   - The hierarchy diagram region. This displays a diagrammatic representation of an organization or position hierarchy. You use the hierarchy diagram region to graphically view, create or modify an organization or position hierarchy.
   - The node list region. This displays a Find block and a list of organizations or positions that you have located using the Find feature and have not yet attached to a hierarchy.
   - The node properties region. This displays details of the selected organization or position. Use the buttons to display further position and assignment details for the selected organization or position.

Finding an Organization or Position in the Hierarchy Diagrammers

You can display a list of unattached organizations or positions so that you can view additional information about them or add them to your hierarchy. You do this using the node list region of the Hierarchy Diagrammer windows.

To find an organization or position:

1. In the Name field, enter the name of the organization or position.

   - To broaden the search, you can use the percent (%) symbol to replace one or more letters; for example, enter Sales% to find Sales North, Sales South, Sales Central and so on.

   - To narrow the search, you can enter different criteria in the other fields next to the Find button; for example, to find all Sales organizations with Senior Sales Executive jobs, you could enter:

     - **Sales%** in the Name field

     - **Senior Sales Executive** in the Job field

     - **Active** in the Hiring Status field

2. Choose the Find button.

   All matches for the criteria you entered are listed below the Find area.

3. To remove the search results and start a new query, choose the Clear button.

Changing the Appearance of a Hierarchy Diagram

You can change the appearance of a hierarchy diagram including:

- The levels displayed in the hierarchy
- The style of the hierarchy diagram
- The text style, size and color, and the background and line colors
- The area of the screen used to display the diagram

The changes you make affect the appearance of the diagram both on screen and when you print it out.

Expanding and Collapsing Diagrams

Organizations and positions with subordinate levels in a hierarchy diagram include buttons for expanding or collapsing diagrams:

- Expand button: indicates an expandable parent organization or position with hidden subordinate levels. Click Expand to display subordinate organizations or positions within the parent.

- Collapse button: indicates a collapsible parent organization or position with subordinate levels. Click the Collapse button to collapse subordinate organizations or positions.

Changing the Style of a Diagram

You can choose from three styles of hierarchy diagram:

- Vertical style: displays the hierarchy diagram in a stacked hierarchical layout
- Interleaved style: displays the hierarchy diagram in an expanded stacked hierarchical layout
- Org chart style: displays the hierarchy diagram in an organization chart style layout.

Choose a style from the View menu or choose the appropriate toolbar button to change the style.

Changing the Font and Colors in a Diagram

You can change the colors of the following elements of a hierarchy diagram:

- Background
- Lines and boxes
- Nodes (organizations or positions)
- Node text

To change the font and colors in a diagram:

1. Launch a hierarchy diagrammer, page 2-94.
2. Choose Edit, Preferences from the menu to display the Preferences window.
3. Choose the Choose Color... button for the diagram element you want to change.
4. Select a color from the Color Picker dialog.

   You can also change the style and size of the text by selecting from the Font Name and Font Size poplists in the Preferences window.

Changing the Display Area of a Diagram

You can increase the area of the screen available for the hierarchy diagram by hiding unwanted regions of the window using the following options on the View menu:

- Node Properties

- Node List
- Toolbar
- Status Bar

> **Tip:** If you still want to see the properties for organizations or positions, you can display a floating properties sheet. Click the Properties button on the Node Properties region before you hide the region, or choose Properties from the Edit menu.

You can also resize the amount of space available to each region of the window, to make the best use of the display space, by dragging the edge of the region.

Displaying Information about Organizations or Positions

You can display additional information about organizations or positions in the hierarchy diagrammers, to assist you in creating or editing hierarchies.

To display additional information for an organization or position:

1. Launch a hierarchy diagrammer, page 2-94.
2. Either:
   - Select an organization or position in the hierarchy diagram region of the window.

   or:

   - Use the Find feature to display an unattached organization or position in the node list region of the window and then select it.
3. Choose one of the following buttons:
   - Organizations or Positions
   - Assignments
   - Organization Holders or Position Holders

   A floating window appears displaying additional details for the selected organization or position.
4. To search further on the selected organization or position, you can filter your search using search criteria. For example, if you select an organization and choose the Position button, you can search using the following criteria: Position Name, Hiring

Status, and Job. The results will appear in a separate page. The navigation buttons appear if the search retrieves more than one page of data

Setting Up a New Hierarchy

Use the hierarchy diagrammers to graphically set up a new organization or position hierarchy. You must first use the Organization or Position window to specify:

- The top organization or position in the hierarchy
- All the subordinate organizations or positions for the hierarchy.

See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

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

To set up a new organization or position hierarchy:

1. Open the Organization or Position Hierarchy window using the Diagrammer menu option. This displays a cut-down version of the Hierarchy window.

   Note: To create hierarchies containing organizations from only one business group, choose the Diagrammer Local option. To include hierarchies from more than one business group, choose the Diagrammer Global option. The availability of these options depends on whether your system administrator has granted you access to the local or global versions of the windows using function security. See Menu Structure, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Enter a unique name for your new hierarchy, and check Primary if it is your main reporting hierarchy.
3. Enter the version number and start date for the hierarchy.
4. Save your work.
5. Choose the Open Editor button to open the hierarchy diagrammer.
6. In the node list region of the window, query the organization or position that represents the top level in the hierarchy and drag it to the hierarchy diagram region of the window.
7. Build the hierarchy by adding organizations or positions, working from the top level down.

- To add an organization or position, drag it from the node list region to the organization or position that will be its parent and drop it on top to add it to the hierarchy. The cursor displays a small rectangle when you are on top of the parent value.

- You can move and remove organizations or positions to modify the hierarchy until you have the correct structure.

8. Save your hierarchy. The hierarchy diagrammer commits the changes to your database to create the new hierarchy.

Creating a New Version of an Existing Hierarchy

Use the hierarchy diagrammers to create a new version of an existing organization or position hierarchy.

To create a new version of an existing hierarchy:

1. Open the Organization or Position Hierarchy window using the Diagrammer menu option. This displays a cut-down version of the Hierarchy window.

   Note: To create hierarchies containing organizations from only one business group, choose the Diagrammer Local option. To include hierarchies from more than one business group, choose the Diagrammer Global option. The availability of these options depends on whether your system administrator has granted you access to the local or global versions of the windows using function security

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

2. Query the name of the hierarchy.

3. In the Version field, use the Down Arrow to move through existing versions of the hierarchy until you reach a version number for which no other data appears. Enter the start date for the new version.

   Overlapping versions of a hierarchy cannot exist. When you create a new version of an existing hierarchy, the system automatically gives an end date to the existing version. Oracle HRMS retains all previous versions of hierarchies for historical information.

4. Save your work.

5. Choose the Open Editor button to open the Hierarchy Diagrammer window. The

new version of the organization or position hierarchy is displayed.

6. Modify the hierarchy to add, move or remove organizations or positions to create the new hierarchy.

7. . Save your hierarchy. The hierarchy diagrammer commits the changes to your database to create the new hierarchy.

   You can also create a new hierarchy by copying an existing hierarchy, page 2-101 and modifying it.

Copying an Existing Hierarchy

Use the hierarchy diagrammers to create a new organization or position hierarchy by copying an existing one.

To copy an existing hierarchy:

1. Open the Organization or Position Hierarchy window using the Diagrammer menu option. This displays a cut-down version of the Hierarchy window.

   Note: To create hierarchies containing organizations from only one business group, choose the Diagrammer Local option. To include hierarchies from more than one business group, choose the Diagrammer Global option. The availability of these options depends on whether your system administrator has granted you access to the local or global versions of the windows using function security.

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

2. Choose New from the File menu, enter a name for your new hierarchy and save your work.

3. Enter a start date for your new hierarchy and choose the Copy Hierarchy button (do not save first).

4. Select the name and version of the hierarchy you want to copy, and choose Copy.

5. Choose the Open Editor button to open the Hierarchy Diagrammer window. The copied organization or position hierarchy is displayed.

6. Modify the hierarchy to add, move or remove organizations or positions to create the new hierarchy.

7. Save your hierarchy. The hierarchy diagrammer commits the changes to your database to create the new hierarchy.

Adding Organizations or Positions to a Hierarchy

Use the hierarchy diagrammers to add organizations or positions to an organization or position hierarchy.

To add organizations or positions to a hierarchy:

1. Launch a hierarchy diagrammer, page 2-94.

2. In the node list region of the window, query the organization or position you want to add to your hierarchy.

3. Select the organization or position name in the node list, and drag it to the organization or position that will be its parent, then drop it on top to add it to the hierarchy.

   The cursor displays a small rectangle when you are on top of the parent value.

4. Save your changes to the hierarchy. The hierarchy diagrammer commits the changes to your database.

Removing Organizations or Positions From a Hierarchy

Use the hierarchy diagrammers to remove organizations or positions from an organization or position hierarchy.

To remove organizations or positions from a hierarchy:

1. Launch a hierarchy diagrammer, page 2-94.

2. Select the organization or position you want to delete from your hierarchy, and drag and drop it into the node list region of the window, or choose Cut to remove it and all its descendants.

   You are not deleting the organization or position from your database; you are just removing it from the hierarchy.

3. Save your changes to the hierarchy. The hierarchy diagrammer commits the changes to your database.

Moving Organizations or Positions in a Hierarchy

Use the hierarchy diagrammers to move organizations or positions in an organization

or position hierarchy.

To move organizations or positions in a hierarchy (drag and drop):

1. Launch a hierarchy diagrammer, page 2-94.

2. Select the organization or position you want to move in your hierarchy, drag it to the organization or position that will be its parent and drop it on top to add it to the hierarchy.

   The cursor displays a small rectangle when you are on top of the parent value.

3. Save your changes to the hierarchy. The hierarchy diagrammer commits the changes to your database.

To move organizations or positions in a hierarchy (cut and paste):

1. Launch a hierarchy diagrammer, page 2-94.

2. Select the organization or position you want to move in your hierarchy, and choose Cut from the Edit menu or choose the Cut button on the toolbar.

3. Move the cursor over an organization or position that you want to move it beneath, or next to.

   The cursor displays a small rectangle when you are on top of the parent value.

4. Choose:

   - Paste, to move the organization or position to be a subordinate of the one selected

   or:

   - Paste Next to, to move the organization or position to the same level as the one selected.

5. Save your changes to the hierarchy. The hierarchy diagrammer commits the changes to your database.

Menu and Toolbar Commands

You can access the following commands from the hierarchy diagrammer menus. Use them to create, edit, save and print hierarchy diagrams and control the display of hierarchy diagrams on your desktop.

Some of these commands are also available from the toolbar, which provides quick access to commands you use often.

File Menu

Save

Saves changes made to the hierarchy to your database.

Refresh

Refreshes the screen to show the latest changes to the hierarchy diagram.

Print

Prints the hierarchy diagram as it is displayed in the window.

Close Hierarchy Editor

Exits the hierarchy diagrammer and prompts you to save any changes.

Edit Menu

Cut

Removes the selected organization or position and any subordinate organizations or positions from the current hierarchy, and places it on the clipboard. Use with Paste or Paste next to, to move the organization or position.

Copy

Copies the selected organization or position and any subordinate organizations or positions in the current hierarchy to the clipboard. Use with Paste or Paste next to, to move the organization or position. When you paste the copied organization or position, it is removed from its original place in the hierarchy and replaced at the new location, thus having the same effect as the Cut option.

Paste

Pastes an organization or position into the hierarchy at the level below the selected organization or position.

Paste next to

Pastes an organization or position into the hierarchy at the same level as the selected

organization or position.

Delete

Removes an organization or position from the hierarchy diagram. Unlike Cut and Copy, this option does not place the organization or position on the clipboard. Only removes organizations and positions from the hierarchy and does not delete them from your database.

Properties (on-screen button)

Displays a floating window showing the properties of the selected organization or position. You can use this instead of the node properties region of the window.

Preferences

Displays the Preferences window, which you can use to change the text style and size, and the colors of the text, lines, nodes and background of the hierarchy diagram.

View Menu

Vertical Style

Changes the view of the current hierarchy diagram to a stacked hierarchical layout.

Interleaved Style

Changes the view of the current hierarchy diagram to an expanded, stacked hierarchical layout.

Org Chart Style

Changes the view of the current hierarchy diagram to an organization chart style layout.

Node Properties

Toggles on or off the region of the windowcontaining the properties of the selected organization or position, enabling you to display more of the hierarchy diagram.

Node List

Toggles on or off the region of the window containing the Find blockand the list of

organizations or positions that are not part of the hierarchy, enabling you to display more of the hierarchy diagram.

Toolbar

Toggles the toolbar on and off.

Status Bar

Toggles the status bar at the bottom of the main hierarchy diagrammer window on and off.

Help Menu

About

Displays information about the hierarchy diagrammer.

Library

Displays help for using any Oracle applications you have installed.

1.

3

Jobs and Positions

Jobs and Positions Overview

Position control is key in large, highly structured agencies. By basing your work structures on positions, you obtain the most flexibility in representing and managing organizational changes over time.

Jobs and Positions

Jobs provide a way to categorize related positions, independent of specific organizations. For example, in US Federal HR, the occupational series code categorizes related positions. You can assign one or more positions to a job. All the positions assigned to that job share the same occupational series, but the position definitions can differ in location, grade and pay plan.

See: Job Management, page 3-5

Positions and Reporting Lines

When you define a position, you specify the organization to which the position reports. The organization definition stores your choice of the reporting information as organization hierarchy or street address. The application displays the appropriate hierarchy information or street address in the RPA depending on what you entered when you set up the organization.

By building work structures based on positions, you have the flexibility of representing structures where reporting lines cross organizations. You can create a position that belongs to one organization and reports to another. The Position window stores the organization to which the position belongs and the Position Extra Information stores the organization to which the position reports.

See: Position Management, page 3-21

Position Hierarchies

You can use position hierarchies to represent the management reporting lines for your agency's departments and sections and accurately represent:

- Reporting relationships that cross organizations
- Hierarchical relationships for the Organizational Component Translation (OCT) report
- Position and organization information for the Request for Personnel Action (RPA)

You can build position hierarchies to model reporting lines or other relationships within the agency. Position hierarchies are very like organization hierarchies. You can set up a primary hierarchy and multiple secondary hierarchies to show reporting lines, including 'dotted line' reporting, and to control access to information. Position hierarchies are dated, so you can create future-dated versions, and can retain previous versions for historical information.

See:Position Hierarchies, page 3-52

Position Description

Many agencies require classified position descriptions (PDs). The written PD describes the position's unique responsibilities, requirements, and working conditions. You can attach the PD to a position and maintain it in the document catalog. In the usual process of classifying a position, a PD is initiated and then routed for review and authorizatio and then completed by the Personnelist who classifies the position.

After classifying a PD, you can attach it to one or more positions. If you process an RPA for an employee whose position is linked to a PD, the application generates a PD Cover sheet with information assembled from the PD, the RPA, and the Position. When you later print the Notification of Personnel Action for the employee's Official Personnel File, you can also print the PD assigned to that position.

See: Position Description Classification Overview, page 3-10

If your agency uses the National Finance Center as a provider, you can submit position records to the NFC by generating the appropriate NFC FESI interface files.

See: National Finance Center Interface, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Key Concepts

To broaden your understanding of jobs and positions, see:

- Job Management, page 3-5

- Position Management, page 3-21
- Position Description, page 3-10
- Information about Jobs and Positions, page 3-22

Jobs and Positions

Position control is key in Government agencies. You can create and validate positions with associated position descriptions, grades, and occupational series. As you define positions in your agency, you can describe their responsibilities, requirements, working conditions, and work schedule.

Does Oracle Federal Human Resources classify positions?

Many agencies require classified position descriptions to describe the position's responsibilities, requirements, and working conditions. Using the product's standard attachment functionality, you can attach the position description to a position and maintain it in the document catalog.

Position information, the position description document, and any other supporting documentation can be routed for approval using the workflow feature.

Does Oracle Federal Human Resources use the Office of Personnel Management's (OPM) Occupational Job Series?

You can define jobs using the supplied OPM-mandated occupational series. Once you define a job, you can establish one or more positions for that job.

Position-related actions are processed using the Request for Personnel Action (RPA)

Does Oracle Federal Human Resources report organization and position information to the Office of Personnel Management (OPM)?

You can represent the reporting relationships within an organization using position and organization hierarchies, and generate the necessary OPM reports such as the Organizational Component Translation Report.

How does Oracle Federal Human Resources reflect the reporting relationship within an agency?

You can use position hierarchies to represent the management reporting lines for your agency's departments and sections and accurately represent:

- reporting relationships that cross organizations

- position and organization information for the Request for Personnel Action (RPA)
- linking jobs into multiple career paths to show suggested progression paths.

Grades and Pay Plans

An employee's compensation is determined by the pay system or pay schedule that is used to set the employee's rate of basic pay. This pay system is usually the relationship of a pay scale to the grade and step of the position the employee holds.

Does the product supply basic rate tables for calculating compensation?

The product supplies Office of Personnel Management basic and GS Special Rate Tables that are common to most federal agencies. The basic tables include predefined pay plan and valid grade combinations.

Does the product support agency-specific tables?

If the pay plan your agency uses is not included, you can define agency-specific pay tables, and create pay plan and grade combinations.

Job Management

Job Management

Job definition functions can contribute to the efficient management of your agency. Jobs provide a way to categorize related positions, independent of specific organizations. For example, in US Federal HR, the occupational series code categorizes related positions. You can assign one or more positions to a job and have all positions related, but varied in the position details, such as location, grade and pay plan.

Candidate Selections

When you define a job, you can also specify:

- The competencies the worker must have. You can copy into the job definition competencies you defined as essential for your enterprise, and you can copy the competencies required for a job to the competence profile of the worker. Thus, you can describe competencies consistently at the business, job, and person levels.

- Work choices, such as work locations and work schedules, that are suitable or acceptable for the job.

Having specified the job requirements (and also recorded the competencies and work preferences of individual applicants and employees), you can use Oracle HRMS's suitability matching functions to identify candidates for roles and roles for candidates.

Comparisons with Industry

Agencies sometimes need to evaluate jobs, in relation to industry standards. Accordingly, Oracle HRMS enables you to:

- Record job evaluation scores. For a particular job, you select an appropriate job evaluation system and record the job's score

- Compare the salary for a particular job in your agency with those for comparable roles in the industry

- Specify whether a job is a benchmark job or relates to one. A benchmark job is one that represents multiple similar jobs in reports and salary surveys.

Job Groups

You can define all roles in an enterprise as jobs. Such roles include those associated with the main business of the enterprise, such as sales manager or clerk, as well as those considered supplementary, such as fire warden or safety representative.

Oracle HRMS organizes jobs into job groups. (Some statutory reports require job group as an input value.) For each business group, there is a default job group to which standard HRMS jobs must belong. Supplementary roles, however, must not belong to the default job group. You can define additional job groups for these supplementary roles and for use in Oracle Projects. Job groups you define can apply globally or within a single business group.

Creating a Job Group

You create job groups in the Job Groups window.

To create a job group:

1. Enter a name for the job group. If the HR:Cross Business Group profile option is set to Y then this name must be unique across the system. If it is set to N then it must be unique within the business group.

2. Select the required flexfield structure. This will determine the fields that are displayed in the Job window when this job group is chosen.

3. Select a business group if required. If the HR:Cross Business Group profile option is set to N, then your business group will be displayed and you will not be able to amend it. If the profile option is set to Y then you can either select your business group, or leave the field blank to create a global job group.

   Note: The HR Default Job Group that contains all the standard HRMS jobs is business group specific and therefore all jobs held within it are only available within your business group. Global job groups only apply to supplementary roles within Oracle HRMS, and Oracle Projects.

4. Check the Master Job Group check box if this is to be the master job group. The jobs within the master job group can have jobs from other job groups mapped onto them using Oracle Projects.

   If the HR:Cross Business Group profile option is set to Y then you may only have one master job group across the system. If it is set to N then you can have one for each of your business groups.

5. Save your changes.

Defining a Job

Jobs provide a way to categorize related positions, independent of specific organizations. You use the Job window to establish a job and associate it to a 4-digit

occupational series code.

You can also enter supplementary roles in the Job window. You can record information about any roles an employee holds which are not part of the employee's contract; for example, fire warden or health and safety representative.

The Further Information field is not used by Oracle Federal Human Resources. In general, you enter the information from the Further Information field in the Position Extra Information flexfields. For example, you enter the FLSA information in the Extra Position Information Position Group 1 flexfield. If you enter information in the Job Further Information flexfield, the application does not save it on update.

If you intend loading historic assignment details into Oracle HRMS, make sure you enter valid start dates for your jobs. You cannot assign an employee to a job before the start date of the job.

> **Note:** Consider using a fixed date as a default for your initial setup, for example, 01-JAN-1901. This simplifies your data entry.

Use the Job window to define jobs.

To create a job:

1. Enter a start date early enough to handle any historical information you want to enter.

2. Select the required Job Group. This defaults to the Default HR Job Group for your Business Group and should not be changed unless you want to enter a job that describes a supplementary role to a person's normal employment, such as a fire warden or health and safety representative, or you are setting up a job to be used in Oracle Projects.

   Only jobs entered in the Default HR Job Group will be available in other windows such as Position, Competencies, or Assignment. The only window within Oracle HRMS that can access jobs outside of the Default HR Job Group are the Supplementary Roles and the Elections window.

3. Click the name field to open the Job Flexfield window. The flexfield that opens is dependent on the Job Group you have selected. Select a job from the occupational series list of values. Choose OK.

   > **Note:** It is recommended that you define only one segment for occupational series and do not use the other segments. If you define additional segments, the job name that appears on the Position form, the RPA, and the Notification of Personnel Action is a concatenation of these segments, which users may find confusing. If you need to capture other job-related information, add segments

to the Position Extra Information.

4. Enter a numerical approval authority value to define an approval level for incumbents of this job. This value is used by Oracle Approvals Management to determine whether a person has sufficient authority to approve a transaction.

5. Indicate whether the job carries any additional employment rights or is a benchmark job. A benchmark job is one that can be used to represent a number of jobs in reports such as salary surveys.

   Save your work and do not complete any further steps, if you are entering a supplementary role.

6. Select a benchmark job, if required.

7. Save the job.

8. Choose the Extra Information button and complete any agency specific information there.

   Note: If you have Oracle Projects installed, you can enter further information in the Extra Job Information flexfield.

   See: Implementing Resource Utilization, *Project Resource Management Implementation and Administration Guide.*

   You can investigate the job categories in your enterprise using HRMS Intelligence.

9. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the job.

   See: Entering Evaluation Information, page 3-58

   If you are following the competence approach for suitability matching, enter your competencies using the Competence Requirements window.

   See: Defining Competence Requirements, *Workforce Sourcing, Deployment, and Talent Management Guide*

10. Choose the Requirements button to enter job requirements, such as required qualifications or valid experience, to help you match people to roles.

    See: Entering Job and Position Requirements, page 3-39

11. Choose the Work Choices button to enter work choices relevant to the job.

    See: Entering Work Choices for a Job or Position, page 3-34

12. Choose the Survey Mapping button to link salary survey lines to your job.

See: Mapping Salary Survey Lines, *Enterprise and Workforce Management*

13. Save the job.

Ending Jobs for OCC Series that End

If OPM ends an occupational series, determine if you have job definitions based on that occupational series and positions associated to that job. To identify the jobs, query the occupational series in the Job window's Name field, then manually end-date these jobs.

To identify the positions, query the occupational series in the Position window's Job field. If you wish to continue using the positions, create a new job and then update the position definition by processing an RPA Change in Data Element (NOAC 800).

To process a NOAC 800 Change in Data Element:

1. Choose Change in Data Element from the Navigator menu.
2. Choose the new occupational series from the List of Values.
3. Complete the RPA, following the usual steps for processing an action.

   When the application updates the HR database with the RPA, the Job field on the Position form changes to reflect the new occupational series.

Position Description

Position Description Classification Overview

Many agencies require classified position descriptions (PDs). Agencies recognize valid positions based on different criteria such as:

- Timing, the date the position is occupied
- Approval, the date the position description is classified
- Budget, the date the funds are appropriated

The written PD describes the position's unique responsibilities, requirements, and working conditions. You can attach the PD to a position and maintain it in the document catalog. For example, you can attach:

- An existing PD
- A modified PD (a copy of an existing description that you've edited and saved)
- A new PD
- Supporting documents, such as Evaluation Statements and Statements of Differences for career ladder position

If you later find that you need to modify the PD, you can do so by reclassifying it. (You can reclassify the PD more than once, if necessary.)

Security

The application supports secure user view and cross-business group functionality. For example, when you create and then save a PD, the application stores the business group ID attached to your login's responsibility with the PD record. The application then limits access to users whose business group login corresponds to the one saved with the PD.

If you require access to all PDs or need to update related information such as Position Extra Information, use a non-secure responsibility.

PD Process

In the usual process of classifying a position, you create (initiate) a PD, route it to a Requester, to an Authorizer, and then to the HR Specialist who completes the PD and classifies the position.

When classifying a PD, you can categorize it as a standard PD, canceled, active, or

inactive. A PD Occupancy form lists the employees whose current or previous positions were linked to the PD. After classifying a PD, you can attach it to one or more positions by entering the PD identifier in the Position Extra Information.

If you process an RPA for an employee whose position is linked to a PD, the application generates a PD Cover sheet that contains information assembled from the PD, the RPA, and the Position. Personnel working with the RPA can view the Cover sheet from the RPA. When you later print the Notification of Personnel Action for the employee's Official Personnel File, you can also print the PD assigned to that position.

Workflow Roles

When processing a PD, the workflow roles are similar to those of the RPA as described in the following table.

Role	Function
Initiator	Can initiate and enter information on a PD, but not the Classifier and Supervisor information; can copy PDs, can view unclassified and classified PDs
Authorizer, Requester	Can enter PD information and sign Supervisor information, but not the Classifier information; can view unclassified and classified PDs
Reviewer	Can view unclassified, classified, and reclassified PDs
HR Specialist	Can complete the entire PD, can initiate and classify a PD without having to route it, can reclassify a PD, can view unclassified, classified, and reclassified PDs

Routing the PD

Using the workflow feature, you can route position information, the position description document, and supporting documentation. By routing the information, you can easily obtain the appropriate approvals for the PD.

The Notification message contains the PD Identifier number that the application automatically assigns the PD (this number is entered in Position Extra Information to link the PD to a position).

The Notification lists the position title by the highest classification level. The

authorization order from lowest to highest is:

- Recommended by Supervisor or Initiating Office
- First Level Review
- Second Level Review
- Department, Agency, or Establishment
- Office of Personnel Management

After classifying or reclassifying a position, the application displays a Closed status for the Workflow worklist and a Routing History status of Classified or Reclassified.

If you want to see the full history of the PD, you can display the Routing History for a record of the status and action taken. The following table describes the status and its associated action..

Status	Action taken
Reclassified, Classified	User chooses Classified or Reclassified when Routing the PD
Canceled	User cancels a PD (PD can only be canceled after it's first saved to the inbox).
Reopened	User reopens and saves a PD that has been previously classified
Authorized/Reque4sted	User enters or changes the name and date information in the Supervisor Certification region (The application does not display a status for the second Supervisor Certification, only the first.)
Initiated	User starts a new PD
Not Routed	User saves the PD to his or her inbox without routing it
No Action	User opens a PD from the inbox and routes the PD without making a change that would produce an Action Status of Requested, Authorized, or Reviewed

Status	Action taken
Reviewed	Reviewer opens, reviews (view only), and routes the PD

The application displays an Action Taken status for the first person listed in the Supervisor Certification region, not the second. The application records an Authorized or Requested status (depending on the user's role) when the user completes both the name and date field in the Supervisor Certification region. If the user changes the date or name, the application enters another status of Authorized or Requested.

Adding an Attachment to the Position Description

After you have completed information regarding your position description, you can add an attachment to the Position Description (PD) to further define the position's duties.

To create the attachment, you can:

- Edit an existing document from the document catalog
- Attach a file from your local file system
- Create a new document directly in the Attachments window.

To add an attachment from the document catalog:

1. Choose the attachment icon by selecting the paper clip.
2. Choose the Document Catalog button.
3. Find an existing document by entering your search criteria and then choosing the Find button.

   For example, choose the Data Type of Web Page to find all web pages in the document catalog.

   All documents matching your query are listed in the Documents region.
4. From the query results, choose a document then select the Preview button to view the document.
5. Select OK to dismiss the Preview window.
6. Choose the document you want to attach to the Position Description and select the Attach 1 button.

The Document Catalog window is dismissed and the attached document appears on the Attachments window.

You can now edit the document you have attached to the Position Description.

7. Repeat steps 1-6 for each document you want to attach from the Document Catalog.

Adding an Attachment not in the Document Catalog

You can create a new attachment by adding a document from your local file system or by creating a document directly in the Attachments window.

To create a new attachment:

1. In the Attachments window, enter the Sequence number in which the attachment should be added to the Position Description.

2. Choose the attachment Category.

3. Enter a Description of the document.

4. Choose the Data Type of the attachment file.

   - If the Data Type is an Image or a Web Page, you must choose a Storage type of Database or File depending on where the document is stored. You must then enter the file path to the document in the File or URL field.

   - If the Data Type is Long Text, OLE Object, or Short Text, you can choose to attach an existing document by specifying the document's file path, or you can create a new document directly in the application by typing into the text field.

5. Save your work.

6. Repeat steps 1-5 for each new attachment you want to add to your Position Description.

Linking Position Descriptions to Positions

Use the Position window when linking a description to a position.

To link a position description to a position:

1. In the Position window, query the position to which you want to link a Position Description.

2. Choose the Extra Information button, and select US Government Position Description.

3. Enter the valid dates of the Position Description.

4. Enter the Position Description Identifier which was generated by the application when the Position Description was created.

5. Save your work.

Printing Position Descriptions

You can print a copy of the PD for the employee's Official Personnel Folder or for your records.

Use the Submit Requests window.

To print the position description:

1. In the Name field, choose Print Position Description.

2. Choose the Position Description Identifier.

3. In the Print Options region, enter the number of copies you want to print, choose a print style, and specify the printer to which you want to print.

4. In the Run Options region, choose whether to Resubmit the print job.

5. Choose Submit.

   The Submission History lists the print jobs you have submitted during the current system session.

   The printed PD contains the information entered on the PD form.

Classifying Position Descriptions

When classifying a position, you can choose to create a new position description or you can copy an existing description and then make changes. If necessary, you can cancel the PD before you update the PD to the HR database.

If you have more than one responsibility, when you classify a new position description, choose the responsibility where the business group is the same as new position's business group. The application saves the business group ID associated with your current login responsibility with the newly created PD record. From then on, the only users who can view or update the PD are those whose login responsibility corresponds to the business group of the stored PD.

After you classify a position, if details about that position require you to update the position description, you can reclassify the position.

See: Reclassifying a Position, page 3-18.

Use the Position Description to create or update PDs.

To classify a new position description:

1. In the Find Position Descriptions window, choose New.

   Fields in the new record are populated by default values that you can change.

2. Enter a start date early enough to handle any historical information you want to enter.

3. Choose the Category of the position description:

   - Active (position is currently occupied by one or more employees)
   - Inactive (position was occupied, but is no longer occupied)
   - Standard (generic agency position description)
   - Canceled (position no longer displays in the database).

4. Enter Position Description information:

   - Choose the Position Status.
   - In the Position Is field, choose the type of position that corresponds to this position description. For example, choose Supervisor or Non-Supervisory depending upon whether this position requires management responsibility.
   - Choose an FLSA type, either Exempt or Nonexempt.

     Note: The FLSA type you choose on the Position Description window must correspond to the FLSA Category you choose on the Extra Position Information window.

   - Enter the Competitive Level.
   - Choose the Position Sensitivity.
   - Choose the Financial Stmt Req type. If no type is required, choose N/A.
   - Check the Subject to IA Action (Identical Additional) check box if the position is subject to an IA Action.
   - Check the Career Ladder check box if this position is associated with a career ladder.

5. In the PD Classifications region:

- In the Classified/Graded By field, choose the Office responsible for completing the position classification
- Enter the Position Title.
- Choose the Pay Plan, Occupational Code, and Grade associated with the position you are describing.

  Note: Make sure that the Pay Plan, Occupational Code, and Grade you choose on the Position Description window is the same as the ones you choose when completing the Position Extra Information.

6. In the Supervisor Certification region, choose the name of one or more employees responsible for certifying that this position description is valid, and enter the date.
7. In the Miscellaneous region, enter:
   - OPM Certification Number
   - Position Classification Standards
   - Any appropriate Remarks
8. If necessary, route the PD to the next destination to obtain any additional authorizations.

   If a PD is routed using a routing list, the application displays a message asking whether to use the routing list. If you choose Yes, the application routes the action to the next destination on the routing list.

   If you choose No and route it to another destination within the same routing group, when that user routes the PD, the system asks whether to resume the routing list. If the user responds yes, the application displays the list of the routing destinations.
9. In the Classifier region, choose the name of the employee responsible for certifying that the classification is valid, and enter the date.
10. To complete the classification, choose Complete PD Classification from the Routing Dialog.

    The application sends an FYI Notification to the classifier's worklist noting that the system has recorded the PD as classified. (You can remove FYI Notifications from your worklist by choosing the Close button.)

To copy an existing PD and classify it:

1. Navigate to the Position Description window.

2. In the Find Position Descriptions window, query an existing position description that you want to copy and modify by entering the specific search criteria.

   The application displays search results in the Position Description window.

3. Choose the Copy button to copy the record information.

   Note: Only users with the role of Initiator in their default routing group can copy a PD.

   The new record displays all of the populated data excluding the Supervisor Certification, Classifier, OPM Certification Number, Remarks, Office of Personnel Management Classified/Graded by information, First and Second Level Review classified/Graded by, Routing History and Routing Group.

   The application does not duplicate attachments. Use the attachment process to include an attached document..

4. Complete the classification and update the position description to the database by following the steps described in classifying a new position.

To cancel a position description:

You cancel a PD that you have not yet updated to the HR database the same way that you cancel an RPA action.

1. Open the PD from your worklist.

   You must have routed the PD at least one time either by routing it or by saving it to your worklist.

2. Choose the Delete icon from the toolbar.

   Note: After you cancel a PD, you may retrieve and copy it, but you cannot change it. For example, you could not change the category to active to reactivate it.

Reclassifying a Position Description

When updates to a position description require reclassification, you can make the necessary changes and then route the PD to gather necessary approvals.

To reclassify a position description:

1. From the Find window, query the PD that you want to reclassify.

   When the application displays the PD, it displays a message asking you whether

you want to reclassify the PD.

- If you choose No, the application displays a view-only PD.
- If you choose Yes, the application displays the PD, retaining all information with the exception of the Classifier certification which it clears.

2. Make the necessary changes to the PD.
3. If necessary, route the PD to complete the form and signatures, including the Supervisor's and Classifier's certification.

   Note: You cannot change routing groups when reclassifying a PD.

4. When you're done, choose Complete PD Reclassification from the Routing Dialog box.

Listing Occupants Associated to a Position Description

When viewing, classifying, or reclassifying a PD, you can have the system display the PD Occupancy form which lists the employees whose current or previous positions were linked to the PD. Before canceling a PD, you can display this form to see if there are any current occupants.

To view a list of occupants:

1. From the PD, choose the PD Occupancy button.

   The PD Occupancy list displays the employees' names, Position name (as entered on the Position form), the Position start and end dates, and the Employee Number.

Linking Employee Information to a Position Description Cover Sheet

The RPA includes US Fed PD Employee Extra Information. The RPA takes information from the US Fed PD Employee Extra Information and the PD and assembles it in a PD cover sheet that is viewable from the RPA.

See: Viewing Position Description Cover sheets, page 3-20

To link employee information to a PD cover sheet:

1. From the Request for Personnel Action form, choose the Extra Information button, and select US Fed PD Employee Information.
2. Choose the Reason for Submission.

For example, choose New if you are creating a new position.

3. Enter an Explanation for this position description.
4. Choose a Service location.
5. Enter any Agency Use specific information.
6. Select OK to dismiss the window.
7. Save your work.

Viewing Position Description Cover Sheets

You can display a view-only version of the Position Description Cover Sheet that includes the data entered when you created the Position Description and data from the RPA.

To view a position description cover sheet:

1. Open an RPA from your Workflow worklist.
2. Choose the Others button.
3. Choose PD Cover Sheet.

   A view-only version of the Position Description is displayed.

   You can print this form from the printer icon located on your toolbar. (This is a print screen function, so the system prints the amount shown on the screen when you choose the printer icon.)

Displaying the PD Routing History

You can view the routing history for a position description from within the PD or from the worklist.

To display the Routing History:

- From the Workflow worklist, choose the Routing History icon in the Reference section of the Notification message.
- From the PD, choose the PD Routing History button.

  Note: The PD displays its routing history, not that of an RPA being processed for a position using the PD.

Position Management

Position Management

The Personnel office establishes positions, classifies and reclassifies positions, processes position actions, and reports organization and position information to the Office of Personnel Management.

The application supports this critical function by enabling you to:

- Classify positions using the position description functionality
- Create and validate positions with associated position descriptions, grades, and occupational series
- Process position-related actions with the Request for Personnel Action (RPA)
- Represent the reporting relationships within an organization through the position hierarchies for security purposes and for the Organizational Component Translation Report.
- Enter requirements for positions and then using the suitability matching tool, match employees' competencies to those required by a position.
- Add up to twenty additional fields in a descriptive flexfield.
- Add any number of Extra Information Types (EITs). This would enable you to set up fields to hold information to which only users with certain responsibilities would have access. For example, you could set up fields only to be used by managers.

National Finance Center Positions

If your agency uses the National Finance Center as a provider, you define two types of positions: master and individual position records. A master position and any individual positions that you define based on the master position share key data items. Employees can occupy individual positions but not the master position.

After you define master and individual position records, you can report these records to the NFC by generating NFC FESI interface files.

See: National Finance Center Interface, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Information About Jobs and Positions

As you define positions in your agency, you can describe their responsibilities, requirements, and working conditions. There are a number of ways to add information:

- You can enter a location for an organization, which provides a default location for all positions within that organization.

- You can attach a position description and position description cover sheet that describes the objectives and tasks of each position.

- You can use descriptive flexfields to add up to twenty fields to each window to hold Extra Information you require. These fields can be global (they always appear), or context-sensitive (they appear only when triggered by another piece of information).

  For example, these fields can record the health and safety requirements of a position, or its suitability for job share. The additional fields appear in a descriptive flexfield.

- You can define Special Information Types to store other information, such as required qualifications or valid experience, to help match people to jobs and positions.

  The application comes with many predefined Special Information Types for education, language, and other commonly maintained information. If you enter data for a person using these Special Information Types, you can use the standard skills matching report.

Work Schedules

The application maintains position-related work schedule and part-time hours information in the Position Extra Information and Assignment Extra Information flexfields. The Assignment Extra Information flexfields display the schedule and hourly information that you set up for the Position. However, you can change this information when you process an RPA, such as a Return to Duty that involves a Change in Work Schedule. When you update the action to the HR database, the application updates the Assignment and Position records with that information, thus synchronizing both Assignment and Position data.

Position Hiring Status

Every position must have a hiring status. The system statuses provided with Oracle HRMS are as follows. You can provide user names for these system statuses and map more than one user name onto each system status, if required.

- Proposed - For modeling or planning.
- Active - Available for use.

  Note: When assigning someone to a position with an RPA, you can initially select a Proposed or Frozen position, but the position must be Active at the effective date, or you receive a warning note.

- Frozen - Position can continue to be used with current incumbents but no new incumbents can be placed in it.
- Eliminated - Position is no longer in use and will not be required in the future. You can eliminate an Active position if it is not assigned currently or in the future. You can reactivate an eliminated position.
- Deleted - Position was set up by mistake, or never approved. You can delete a Proposed position before its Start Date (the date on which it was approved for use). You can reactivate a deleted position.

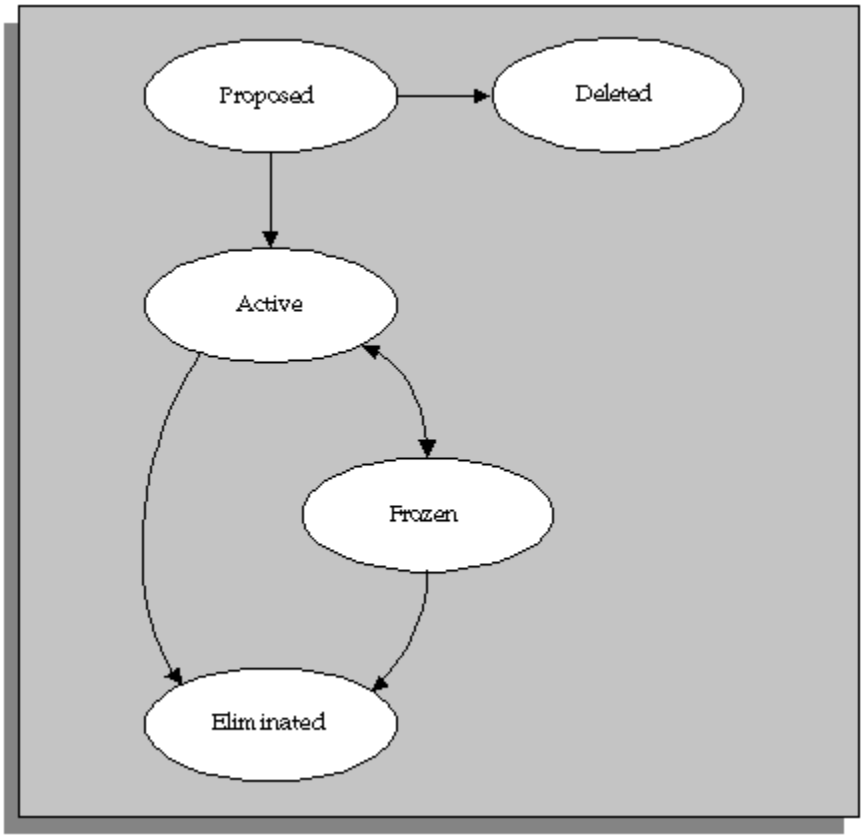
If the position was never assigned or processed using an RPA, you can purge the position from the database using datetrack delete. You can reactivate Eliminated or Deleted positions.

See: Deleting a Position, page 3-39

You cannot eliminate an occupied position. If you want to assign a position that you plan to eliminate, for example to a temporary worker, first eliminate the position and then assign it using an effective date that is earlier than the elimination date.

Positions have a Valid/Invalid status as well as a hiring status. You cannot assign someone to an Active position if the position status is Invalid. You can only assign someone to a position with an Active hiring status and a Valid status. If the hiring status is Eliminated or Deleted, the application prevents updates to the position information, position extra information, and position status.

Valid Changes to Position Hiring Status



Position Extra Information Types

You can define as many Extra Information Types as you require to hold additional information about positions.

US Federal Position Extra Information Types

The following is a list of US Federal Position Extra Information types. For a table of lookup type names for each of the flexfield segments, refer to Position Extra Information Types, *Configuring, Reporting, and System Administration Guide*.

- US Federal Valid Grade Information - valid and target grade, pay tables and pay basis information, employment, and professional categories, and tier information. The tier information determines the pay range that the application uses to process pay calculations for physicians and dentists.

- US Federal Position Group 1 - Personnel office and payroll office ID information , FLSA category, work schedule, and bargaining unit status, competitive area, and supervisory status as well as other information

- US Federal Position Group 2 - date position classified, appropriation codes and LEO indicator, as well as other classification information
- US Federal Position Group 3 - information submitted to the National Finance Center for payroll and personnel processing, such as official titles, position schedule, NFC agency code
- US Federal Position Description - the position description ID and the start and end dates of that description
- US Federal Position Interdisciplinary - interdisciplinary information submitted to the National Finance Center for payroll and personnel processing
- US Federal Position Language Requirements- information about language proficiency used to define and establish language requirements for position holders
- US Federal Position Obligated - the type of position obligated and the social security number of the person for whom it is reserved
- US Federal Mass Actions - mass realignment, mass transfer, and appropriation information; duty station, personnel office and payroll office ID information
- US Federal Position EDP/HDP Type - the type of exposure to environmental conditions or hazardous duty, and the start and end date

  The US Federal Position Group 2 extra information stores the EDP/HDP Last Review Date.
- US Federal Alt HR - the regulatory system associated to the position, such as standard or alternative federal HR system

Establishing, Defining, and Assigning Positions

The process of creating, defining, and assigning positions involves several steps.

1. **Classify the Position**

   Use the Position Description functionality to create and classify a position.

   See Classifying Position Descriptions, page 3-15

2. **Define the Position**

   Use the Position window to define positions within your organization. There you:

   - Enter the organization, location, and job information
   - Add the position to a position hierarchy
   - Associate the position to a position description

- Decide whether to include the position when building the OCT report
- Enter position requirements

  See: Entering Position Requirements, page 3-39
- Enter the skills that position holders require and position evaluation scores, if you have set up a position evaluation system

  See: Defining a Position, page 3-26

3. **Add Information**

   Enter additional information about the position in the Extra Information flexfields.

4. **Validate the Position**

   Validate the position.

   See: Validating a Position, page 3-33

5. **Assign the Position**

   Assign the position to an employee using the Request for Personnel Action (RPA) functionality.

   See: Processing a Request for Personnel Action, *Workforce Sourcing, Deployment, and Talent Management Guide*

6. **Synchronize Positions**

   Schedule the Synchronize Positions process to update the non-datetracked positions table with changes made to the date tracked table.

   See: Work Structures, Set up the Synchronize Positions Process to Run Nightly, *Oracle HRMS Implementation Guide*

Defining a Position

You use the Position window to define positions within your organizations and to add them to position hierarchies.

The check boxes at the top of the window are for information purposes only and indicate whether the position belongs to an organization selected for position control:

- Open: unfilled
- Under Review: changes to the position definition are in process using a position transaction
- Approved Future Actions: the position or changes to it are approved for a future effective date

If your system administrator has implemented the product to use the National Finance

Center (NFC) as a provider, the position window includes a Master Record field. You define a master position record and use it as a basis for defining associated individual positions that you assign to employees.

Effective Dates

There are several dates on the Position form:

- Start date at the top of the form: Displays the earliest date on which a person can be hired into this position
- Hiring Status Start Date: Displays the date the position changed to the status shown in the Status field
- Hiring Status Proposed End Date: Displays the date the current status is expected to change
- Effective From and To Dates at the bottom of the form: Displays the effective date range for the record you are viewing.

To define a position:

1. Set you effective date early enough to handle any historical assignment information you want to enter.

   Note: Consider using a fixed date as a default for your initial setup, for example, 01-JAN-1951. This will simplify your data-entry.

2. If you are selecting the Active hiring status for the first time, enter a Start Date, the earliest date on which you can hire a person into this position.

3. For non-NFC implementations, enter a unique name for the position in the Date Effective Name field in the Position Details tabbed region.

   Note: The Name field at the top of the window displays the latest name on record for the position, irrespective of your effective date. This name is used on all other windows, such as Assignment.

   A window opens when you enter the Name field. You must enter a unique combination of segments in this window. For example, if you are creating two similar positions, you can differentiate them by assigning each position a unique sequence number.

   - Enter a unique name for the Position Title

     In general, use the official title from the classified position description.

- Enter a Position Description Number
- Enter a Sequence Number, if appropriate for your agency

  Note: If you enter a Sequence Number that begins with zeros, the application displays them here, but removes them on the RPA and the Notification of Personnel Action, displaying the number only. For example, if you enter 001, the RPA displays 1.

- Enter an Agency/Subelement Code

4. For NFC implementations, if you are defining an individual position, skip to the next step.

   If you are defining a Master Record, leave the Master Record field blank. In the Date Effective Name field in the Position Details tabbed region, enter a unique name for the position.

   A window opens when you enter the Name field. You must enter a unique combination of segments in this window.

   - Enter a unique name for the Position Title
   - Enter an OPM Agency Code
   - Enter an NFC Agency Code
   - Enter a Personnel Office ID
   - Enter a Position Number (the Master Record Number of Individual Position Number)
   - Enter a Valid Grade

5. For NFC implementations, if you are defining an individual position record, in the Master Record field, select the master position on which to base your position definition.

   The application automatically enters the key data shared between the master and individual position record in the Date Effective Name field. Complete the two remaining fields, but do not change any of the automatically entered information.

6. Select the Type of position. The choices are:

   - Single Incumbent, meaning that only one employee is allowed to hold the position at any time

- None, which you can select if you do not need to record position types
- Shared (Public Sector), meaning there can be several incumbents, up to the value of the FTE field
- Pooled (Public Sector only), meaning the position is loosely defined so rules about FTE and hours are not enforced by the system

> **Note:** The two public sector designations Shared and Pooled are not supported in the current release.

7. If the position is permanent and budgeted every year, select the Permanent check box.

   If you select Permanent on the Position record, and your agency uses the National Finance Center as a HR or Payroll provider, the FESI position transmission reports this position as a permanent position for budgetary purposes.

8. If the position is only used in one season each year, select the Seasonal check box. You can enter the season dates in the Seasonal Information extra information type.

9. Select the organization and job for this position. They must have a start date on or before the start date of this position.

   > **Note:** You cannot change the organization or job once you have saved the definition.

   You can set up several positions that have the same job in the same organization. Each position name must be unique.

10. If you know that the position will be transferred to another organization or job in the future, enter the proposed end dates now, for information.

11. Select a hiring status.

    The Start Date field indicates when the current hiring status came into effect.

    > **Note:** When you process a position-related action using an RPA, you can select a Proposed, Active, or Frozen status. This allows you to process future-dated actions. However, at update to HR, the system only updates Active positions.

12. If the status is Frozen, you must enter a proposed end date for the status. Optionally, you can enter a proposed end date for Proposed or Active statuses, for information.

13. Select a location for the position, or leave the default, which is the location of the organization.

Entering Hiring Information

14. Enter the number of Full Time Equivalents to be assigned to this position. If the Position Type is Single Incumbent, FTE must be 1.0 or less.

15. You can enter the number of incumbents that are planned for the position in the Head Count field.

16. If required, enter the earliest date at which incumbents can be hired into this position. If you have created a requisition and vacancy for this position, the earliest hire date must be within the vacancy dates.

17. Enter the date by which the position should be filled. This date must be on or after the Earliest Hire Date.

18. Select the Permit Recruiting check box if the position is not open but you want to enable advertising, job posting and acceptance of applications.

    For example, you might select this check box for a position that is frozen but due to become active in the near future.

19. Select the payroll to which the position's incumbents are normally assigned. This payroll's calendar can be used for calculations of budgeted amounts and commitments.

Entering Work Terms

> **Note:** The Working Hours and Normal Start and End Times default from the organization, but you can override them.

20. Enter a number in the Working Hours field, and select the corresponding period of time in the Frequency field. For example, enter 40 and select Week.

21. Enter the normal start and end times in 24 hour format. For example, for 5.30 p.m., enter 17:30.

> **Note:** If this position operates within a shift system or has an unusual work schedule, you can record the shift pattern or days worked in the Work Choices window.

22. Select the name of a person who supervises this position. See also the Supervisor field in the Related Positions region if the position is supervised by the holder of a specified position rather than a named person.

23. Select the Replacement Required field if you want to warn users that they should enter the name of a replacement when they enter an absence for a holder of this position. You might do this for positions where it is essential that a person is in charge at all times.

Related Positions

24. For information purposes, you can select the position held by the supervisor or manager of this position.

25. In the Relief field, you can select the position that should be held by people who cover this position when the incumbent is absent.

26. Select the position from which a successor will move to fill this position.

Extended Pay Term

27. For academic positions, if salary can be paid over a longer period than the work term (such as a 9 month appointment paid over 12 months), click the Extended Pay Permitted check box.

28. If extended pay is permitted, enter the start and end dates of the work and pay terms.

Entering Additional Details

29. Click the Extra Information button. In each Extra Information type, enter the required information and the information requested by your agency. For example, you might add language details to establish the language proficiency required by applicants who apply for this position.

    See: Position Extra Information Types, page 3-24

    The application supplies default values for the Position Group 1 and Position Group 2 flexfields that you can change by entering or choosing a different value. When you create a new position, the application automatically enters APPR (Appropriated Fund Position) as the default Position Type in Position Group 2 Extra Information. When the application generates NPAs (batch or individual) or counts records before generating CPDF reports, it acts only on Appropriated positions.

    If you are defining non-standard positions (authorized alternative HR systems such as the National Security Personnel System), you can specify the position's regulatory system in the Position System Indicator in the US Federal Alt HR System extra information.

    > **Note:** You do not need to enter a Position System Indicator for a standard HR system. The application treats values of null or 00 as

positions for standard HR systems.

See: Alternative Federal HR Systems, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

30. To simultaneously save and validate the Extra Information, click the Validate button after completing each Extra Information type. (Saving alone does not validate the position data.)

31. If required, enter comments, a posting description for recruitment purposes, and any special confidentiality or security requirements, such as a clearance level.

32. To add the position to one or more position hierarchies, choose the Reporting To button. Select a hierarchy and the name of the position to which this position reports.

33. Save your position.

34. Click the Evaluation button to enter evaluation information and an overall evaluation score for the position.

    See: Entering Evaluation Information, page 3-58.

35. Click the Requirements button to enter position requirements, such as required qualifications or valid experience, to help you match people to roles.

    See: *Entering Position Requirements*, page 3-39

    Note: Consult your HR manager or system administrator to determine whether this is the right window for entering position requirements. Use this window if requirements were defined using Special Information Types. Use the Competence Requirements window if you are following the competence approach.

36. Click the Occupancy button to view all those people who have held a selected position or who are applying for it, and the dates of their occupancy. This information could be relevant for selecting people with the necessary skills for similar positions.

    See: Viewing Position Occupancy, *Oracle HRMS Enterprise and Workforce Management Guide*

37. Click the Work Choices button to enter work choices that can affect an employee's, applicant's, contractor's, or ex-employee's capacity to be deployed within your enterprise (or a customer's).

    See: Entering Work Choices for a Job or Position, page 3-34

38. When you are done, save your position.

39. Click the Validate button to have the system perform the necessary edit checks and update the database with the new information.

    You can only use valid positions when updating an RPA to the HR database. Each time you change data in the position, validate the position again by clicking the Validate button.

Validating a Position

Positions have a Valid/Invalid status as well as a hiring status. You cannot assign someone to an Active position if the position status is Invalid. You can only assign someone to a position with an Active hiring status and a Valid status. If the hiring status is Eliminated or Deleted, the application prevents updates to the position information and changes the position status to Invalid.

When you create a position or change position data in the Position window or flexfields, the position becomes invalid.

To validate a position:

1. Choose the Validate button.

   The application applies business rules that check the data for errors and alerts you if it finds any. You can then correct the information and validate the position again.

   If you change the information, you can re-choose the Validate button to simultaneously save your changes and validate the data.

   After you validate the position, you can use it when processing position-related Requests for Personnel Action.

Entering Additional Information About Jobs and Positions

As you define roles in your agency, you can describe their responsibilities, requirements, and working conditions. There are a number of ways to enter additional information about a role:

1. You can attach documents to each job or position record.

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

2. You can add up to twenty additional fields to the Job window, and up to thirty to the Position window using a descriptive flexfield.

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

3. You can add any number of Extra Information Types (EITs) to each window.

   See: Setting Up Extra Information Types (Excluding Organization EITs), *Oracle HRMS Configuring, Reporting, and System Administration Guide*

4. You may need to add other information, such as required qualifications or valid experience. You do this by entering competencies against jobs and positions.

   See: Defining Competence Requirements - No Core Competencies, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

5. **Comparing and Relating Roles**

   You may also want to relate roles to each other. You can relate roles in the following ways:

   - By forming multiple hierarchies of positions to show reporting relationships or career paths

     See: Creating a Position Hierarchy, page 3-52

   - By linking jobs into multiple career paths to show suggested progression paths.

     See: Defining Career Paths, *Workforce Sourcing, Deployment, and Talent Management Guide*

   - By recording successor positions and relief positions (to cover in the case of absence) against each position

     See: Defining a Position, page 3-26

Entering Work Choices for a Job or Position

You can enter work choices that can affect the capacity of workers and applicants to be deployed in your enterprise. Work Choices include willingness to travel, willingness to relocate, and preferred working hours and work schedule. You can enter work choices for a job or position, and compare these with the personal work choices entered for people.

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*

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Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the Job or Position 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.

You enter this information in the Work Choices window, accessed from the Job or Position window.

To enter work choices for a job or position:

1. Check the relevant work requirements boxes if the job or position requires the holder to:
   - Work in all locations
   - Relocate
   - Be willing to relocate
   - Travel
   - Hold a passport
2. Enter the length of time the worker must perform the job or position, for example, indefinitely or two years.
3. Enter the normal working hours (for example, 9.00 to 5.30), the work schedule (the working days in the week or pattern of shifts), the proportion of full time hours required, and the minimum length of service required.
4. Check the relevant international deployment boxes if the job or position requires the worker to:
   - Work in all countries
   - Be willing to relocate
5. Select the countries to which the worker might be relocated.
6. Select the locations to which the worker might be relocated.

7. Enter any further job or position requirements, if required.

Find a Position

When you navigate to the Position window, the Find Position window automatically displays in front of it.

To query a position using the Find Position window:

1. Do one or both of the following:
   - Enter a full or partial query on the position's name.
   - If relevant, enter a query on the other fields, such as the job, organization, location, and status.
2. When you click the position's name, the US Federal Position window automatically displays in front of the Find window.
3. Enter your query criteria and click:
   - OK to search for Position titles that match your criteria in one or more fields
   - Cancel to exit the window without conducting the search
   - Combinations for Position titles that match the criteria you have entered using wildcard characters

     For example, you might restrict a search by entering a wildcard for a Position Title of Admin%.
   - Clear to remove the contents from the fields
4. In the Find Positions window, click Find.

   The position found by the query is displayed in the Position window. If the query found more than one position, you can use the [Down Arrow] key or choose Next Record to display the next person.

Changing a Position

You can change the position definition for unoccupied positions by making manual changes in the Position window. For occupied positions, you determine whether the changed information requires an RPA action such as a Change in Data Element (800 NOAC). If not, you can changed the information manually in the Position window.

When you change the position definition, the application maintains a complete record

of your changes using DateTrack. If you change the position today and then process a retroactive action with an effective date of a month ago, the RPA and the Notification of Personnel Action use the values from a month ago.

You cannot change a position's hiring status if it is Eliminated or Deleted. If a position's hiring status is proposed, you can change its start date.

See: Position Hiring Status, page 3-22

If your agency uses the National Finance Center as a provider, you cannot change the key data items shared between the master and individual position. If you need to change key data, such as the NFC Agency code, you must create new master and individual positions, move the affected employees to the new positions, and end the former positions.

See: National Finance Center Interface, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Use the Position window to change the information in an unoccupied position or to change the non-RPA position information in an occupied position.

To change a position:

1. Set your effective date to the day the changes come into effect.
2. Update the position definition as required.
3. To record the source of changes, such as the formal amendments, choose the Additional Detail tab.
4. Enter a reference number, details of the recommended amendment, and the date on which the amendment takes effect in the Amendment Information region.
5. Save your work

Changing the Position Title

The Position window stores the position's organization, location, the job occupational series, and the position title, comprised of the segments of the position key flexfield.

You change the position title by processing a personnel action or by performing manual data maintenance. For example, you can change the Position Sequence Number by manually entering a different value, and the Occupational Series with a Change in Data Element Personnel action (800 NOAC).

The Position window is datetracked. If you change the position title today and then process a retroactive action with an effective date of a month ago, the RPA and the Notification of Personnel Action use the values from a month ago.

An exception to this guideline are the CPDF, SF113-A, and retroactive mass actions and reports. They use the latest position title:

- CPDF and SF113-A reports

  If you change the Position title and then run a retroactive report, the application displays the latest position data, not the data you had before you made the change.

- Mass Action actions and reports

  If you change the Position title and then process a retroactive mass action, the application selects records based on the latest values, not the values you had before you made the change.

  For example, if you change the Agency Code for a Clerical Assistant from XX02 to XX44, and then process a retroactive Mass Salary action selecting Agency Code XX02 records, the application does not select the person assigned to the Clerical Assistant position for a salary action, because that person's Agency Code is XX44 not XX02.

Use the Position window.

To change the position title:

1. Set the effective date to the date on which you want the position name changed.
2. Query the position that you want to change.
3. Click the Position Name field to display the position key flexfield segments.
4. Change the data there.
5. Save your work.

Representing Structures Where Reporting Lines Cross

By building work structures based on positions, you have the flexibility of representing structures where reporting lines cross organizations.

When you set up an organization, you enter an agency code for it. When you create a position, you enter the organization name in the Position window and its agency code in the Position flexfield.

However, these values don't have to correspond. You can create a position that belongs to one organization and reports to another.

To create a different reporting organization:

1. Enter the organization to which the position belongs in the Position window.
2. Enter the organization to which the position reports in the Position flexfield.

   See: Organizational Component Translation Report, page 6-8

Entering Job and Position Requirements

Using the Job Requirements window and Position Requirements window, you can store any personal attributes or experience required by a job or position. You can then use this information to list employees or applicants who might be suitable to hold the job or position.

> **Note:** If you are following the competence approach for suitability matching, enter competence requirements for jobs and positions in the Competence Requirements window.

To enter job or position requirements:

1. Select the name of a special information type.
2. Enter the Requirements field to open the window corresponding to this special information type.
3. In this window, enter the precise requirement of the job or position and choose OK.
4. If the requirement is essential to the job or position, check the Essential check box. This information is used in the Skills Matching Report.
5. Save the requirements.

Deleting a Position or Job

You can delete a job if no position is currently or has ever been created using the job.

You can delete a position with a Proposed hiring status and eliminate a position with an Active hiring status. You can also remove a position record from the database if it has never been assigned or used by an RPA.

To delete a Proposed position:

1. Set your effective date to the date on which you want to delete the Proposed position.
2. Change the Hiring Status to Deleted.
3. Save your work.

To eliminate an Active unoccupied position:

1. Set your effective date to the date on which you want to eliminate the Active

position.

2. Change the Hiring Status to Eliminated.
3. Save your work.

To remove a position from the database:

1. Set your effective date to the date on which you want to remove the position record from the database.
2. Choose the datetrack delete icon from the toolbar.
3. Choose Purge.

   When you delete a position, the Extra Information for that position is also deleted.
4. Save your work.

To restore a position using datetrack delete:

1. Query the position you deleted or eliminated.
2. Set your effective date to the day before the effective date on which you deleted or eliminated the position.
3. Choose the datetrack delete icon from the toolbar.
4. Choose Next to remove the changes made to the next record, All to remove the changes made on all subsequent records.
5. Save your work.

   The Hiring Status is restored to Active.

To change a job's end date:

1. Edit the To field in the Dates region.

Processing Recruit and Fill, Establish, Abolish, and Review Actions

When processing a position action that does not involve a person, such as Recruit and Fill, Establish, Review, or Abolish Position actions, you can use the RPA for information purposes.

To use the RPA for notification and authorization:

1. In the Action Requested field, indicate the action you want to take, such as Recruit and Fill.

2. If you are processing an action for an unoccupied position, select the position from the To Position list of values.

   If you are processing an action for an occupied position, such as a Review action, you can display the position information by first choosing the current occupant's name.

   Note: You cannot abolish a position that is currently occupied.

3. Use the Notepad or the Remarks section to add comments about the action you are taking.

   If you later change families, for example, to process an Appointment for a Recruit and Fill action, the application retains these comments. If you no longer require this background information, you can delete it from the Notepad or Remark.

4. Print the RPA if you want a paper record of this action and the Notepad contents.

5. Complete an Establish, Abolish, or Review action by choosing End Routing from the Routing dialog box.

   The application enters the status of Closed in the Workflow Inbox and Ended in the Routing History.

6. Complete a Recruit and Fill position by changing families to the appropriate action, for example by changing to an Appointment action when you have an applicant to hire.

   If you do not fill the position, you can always close the Recruit and Fill RPA by choosing End Routing from the Routing dialog box.

Defining Position Hiring Statuses

Several system hiring statuses are provided with Oracle HRMS. You can provide user names for these system statuses and map more than one user name onto each system status, if required. Use the User Types and Statuses window.

Note: You can view any lookup type in this window. However, in the current release, you can only define user names for position hiring statuses.

To define user hiring statuses:

1. Select the entity for which you are defining user types. For hiring statuses, this is POSITION_AVAILABILITY_STATUS.

2. Select a Business Group or leave this field blank if you want your hiring statuses to apply in all Business Groups.

3. To see the user statuses already defined for the Business Group (or across all Business Groups), choose Find All from the View menu.

   You can overwrite the displayed user types if you want users at your site to see a different status name.

   If you want more that one user status for a system status:

4. Choose New Record from the Edit Menu.

5. Select the system status and enter your new user status.

6. Save your work.

Viewing Position Occupancy

The Position Occupancy folder lists all those people who have held a selected position or who are applying for it, and the dates of their occupancy. This information could be relevant for selecting people with the necessary skills for similar positions.

> **Note:** As supplied, this folder displays employees who have held the selected position or who are scheduled to hold it. Your system administrator can create a customized version of the form to display applicants who are currently applying for the position.
>
> The supplied folder also contains a button to open the People window to see further details of an occupant. Your system administrator can change the buttons displayed on this window.

To view occupants of a position:

1. In the Position window, query a position and choose the Occupancy button.

   Occupants are listed in reverse date order. Where a person has occupied the same position at different times, a separate record is created for each occupancy.

Viewing Further Details of Occupants or Applicants

To see further details of occupants or applicants:

1. Select the person's record in the Position Occupancy folder and choose the Person button.

   Note: There is no restriction on the assignments you can view in the Position Occupancy folder. However, you cannot view further details if you do not have clearance to view that person's records.

Copying a Position

Position Copy reduces the time and effort required to create positions and ensures that position data is uniform and accurate across positions. You can use it when creating positions in anticipation of a change in organization, budget, or work plans.

When you use Position Copy, you have the flexibility to:

- Specify criteria for finding and selection position(s)
- Use existing positions and create new ones making minor or major changes to the position definition
- Preview the results before creating the final copies
- Save the set of positions and continue working on it at another time, for example when you have received all the information required to complete the position definitions

The Contexts window specifies the information (columns) you can view and change, based on Responsibility, Application, and Legislation.

See: Defining a Context for Mass Actions, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

In addition, your system administrator can restrict the positions that appear in the window to those falling within your security profile.

Use the Position Copy window to create new positions.

To copy a position:

1. In the Name field, enter a name to identify the set of positions to be copied. (Enter a name even if you are going to copy only one position.)
2. In the Effective Date field, enter a date that corresponds to the position data you want copied.

The Effective Date applies to all the positions that you query. If you do not enter a date, the application uses the current date.

Entering Selection Criteria

3. Choose the Original tab and enter the Selection Criteria. You can copy a specific position or retrieve all positions that correspond to the criteria.

   - To copy a *specific* position, enter the Position Name and the position key flexfield information. Skip the Other Criteria field.

     Note: If you do not know the information to enter in each position key flexfield, choose the Combinations button and use the Position find dialog.

   - To retrieve *all* positions that correspond to a job, organization, or location, skip the Position Name field and enter Other Criteria.

     When you click the Other Criteria field, the system displays a dialog where you can choose a Job, Organization, Hiring Status, Position Type, and/or Location from the supplied List of Values.

     The application displays the position's current name (not the date-tracked name).

4. In Default Copies field, enter the number of copies for each retrieved position.

5. Choose Query to display the positions that match the Selection Criteria.

6. If necessary, change the number of default copies.

   - To have the application enter the default number of copies, choose All from the Selection list.

   - To have the application ignore positions you do not want copied, choose None from the Selection list.

   - To have the application copy a few positions from the list of retrieved positions, locate the positions you want to copy. Enter a zero (0) in the Copies column next to each position. Choose Invert from the Selection list. The application changes the zeroes to the Default Copies number and deselects the remaining positions.

   - To enter a greater or lesser number of copies than the default amount, manually change the number of copies in the Copies column.

Entering Changes for New Information

7. Choose the New tab.

8. Click the Change List field to display the Change List's supplied values. Enter information that you want applied to the new positions.

   The information you enter in the Change List applies to all the positions; however, after you create your new positions, you can edit the contents of individual fields.

   > **Note:** In the Change List items, the Start Date is the new position's Start Date at the top of the Position form, and the Effective date, the new "From" Effective Date. If you don't enter dates in these fields, the application uses the existing position's dates.

9. In the Position Name field (optionally), enter a value for one of the position key flexfield segments that you want to replace on all the newly created position names.

   > **Note:** The application automatically increments the Position Sequence for you upon update to the HR database. The application identifies the greatest number used for the Position Sequence. Using this number as the basis, it automatically increments each new Position Sequence number by one.

   You can change other segments in the position name or other position data items by increments or by adding suffix or prefix information as described in the following steps.

10. In the Column field, choose a data item that you want to change.

    The application changes this item in each record based on the information you supply in the following steps.

    > **Note:** If you choose a different Column identifer, you must manually change the new position names to make each one unique before submitting the positions for update.

11. Choose an Operation. Use this field to specify how you want the Column item changed:

    - Choose Replace to substitute the data with data you enter in the With and/or Increment fields.
    - Choose Suffix or Prefix to append the information in the With and/or Increment fields.
    - Choose None to skip the Operation field.

Choose this option when you want to change the data manually on the new positions rather than automatically apply an identifier.

12. In the With field, enter alphabetical and/or numeric information that replaces the Column item, or serves as a suffix or prefix.

13. In the Increment By field, enter an amount by which to increase or decrease the Column item.

    The identifier for the first new position has an increment of zero. Subsequent positions increase or decrease this number based on the amount entered in the Increment field.

    For example, if you create five positions for Manager and enter II as a suffix in the With field, the new positions become ManagerII0, ManagerII1, ManagerII2, and so on. If you skip the With field and enter an increment of 1, the new positions become Manager0, Manager1, Manager2, and so on.

14. Select the Other Info button for a list of additional position data to copy.

    The application automatically copies all the US Federal extra information types associated with this position with the exception of information unique to the source position (Position Description, US Federal Position Obligated, and Position Mass Action extra information). The application does not copy the original position's task flowed information, such as its event history or evaluation data.

    Select Work Choices if your agency uses this information in its position definitions.

15. Choose the Create New button.

    When you choose the Create New button, the application creates a set of positions based on your selection and change criteria.

16. Deselect those positions that you do not want to copy.

    - To have the application skip positions you do not want copied, choose None from the Selection list.

    - To have the application copy a few positions from a longer list, deselect the positions you want to copy. Choose Invert from the Selection list. The application selects the formerly deselected positions and visa versa.

17. Make any necessary changes to the position data, replacing the displayed data by entering new data or choosing the appropriate data from the supplied list of values.

    For example, you might change the Status, to change an existing status from Frozen to Proposed.

Making Further Changes to Selection Criteria

If you change the Selection Criteria after you create new positions, and then rechoose the Create New button, a dialog appears asking if you want to replace the positions and overwrite any manual changes that you have made. Choose No to keep your changes and Yes to replace the positions.

> **Note:** If you are changing the Selection Criteria to model different results, you might create two Position Copy sets, submit the set you want and delete the other.

18. Choose the Submit button to create the new position(s) and to update the database.

    When the set of positions is submitted, the application refreshes the position data as of the Effective Date, but leaves unchanged any manual changes that you made or updates that you made to the Change List items.

    The status of the new position is the same as the original position. For example, if you copy a position with a status of Invalid, the new position has the same status. To validate the position, in the Position window, query the new position, and then choose the Validate button.

    If your newly created positions require different Extra Information, edit the copied information by querying the new position in the Position window and then making the necessary changes.

Correcting Errors

If you copied more than one position, the successfully updated positions display a Status of Complete. You can take no further action on these positions.

If the application encounters an error when you submit the set, for example, a duplicate position name, the Status changes to Error New Record(s).

Updating Positions

Mass Position Update reduces the time and effort required to update positions and ensures uniform and accurate data across positions. You can use it to modify positions in anticipation of a change in organization, budget, or workplans.

When you use Mass Position Update, you can:

- Specify criteria for finding and selecting position(s)
- Change the position definition
- Preview the results before creating the final changes
- Save the set of positions and continue working on it at another time, such as when

you have received all the information required to complete the position definitions

The information that you can select and change when updating positions depends on your Responsibility defined in the User Profile. The Contexts window controls what information you can view and change based on Responsibility, Application, and Legislation. In addition, your system administrator can restrict the positions that appear in the window to those falling within your security profile.

To update a position:

1. Open the Mass Position Update window.

2. In the Name field, enter a name to identify the set of positions to be updated. (Enter a name even if you are going to modify only one position.)

3. In the Effective Date field, enter the date that you want the positions to change.

   The Effective Date applies to all the positions that you query. If you do not enter a date, the system uses the current date.

Entering Selection Criteria

4. Choose the Original tab and enter the Selection Criteria. You can change a specific position or retrieve all positions that correspond to the criteria.

   - To update a *specific* position, enter the Position Name and enter the position key flexfield information. Skip the Other Criteria field.

     Note: If you don't know the information to enter in each position key flexfield, choose the Combinations button and use the Position find dialog.

   - To retrieve *all* positions that correspond to a job, organization, hiring status, position type, or location, skip the Position Name field and enter Other Criteria.

     When you click the Other Criteria field, the system displays a dialog where you can choose a Job, Organization, Hiring Status, Position Type, and/or Location from the supplied Lists of Values.

5. Choose Query to display the positions that match the Selection Criteria.

6. If necessary, deselect all the positions you do not want to update. You can manually deselect positions, or you can use the Selection pop-up list to select None, then manually select the positions you want to update. Alternatively, you can deselect the positions you want to modify, then choose Invert. If you change your mind and want to update all the queried positions, you can choose All.

Entering Changes

7. Choose the New tab.

8. Click the Change List field to display the Change List's supplied values. Enter information that you want applied to the positions.

   The information you enter in the Change List applies to all the positions; however, after you modify your positions, you can override the contents of individual fields.

   > **Note:** In the Change List items, the Start Date is the updated position's Start Date at the top of the Position form, and the Effective date, the new "From" Effective Date. If you don't enter dates in these fields, the system uses the existing position dates.

9. Choose the Create New button.

   When you choose the Create New button, the system creates a set of positions based on your selection and change criteria.

10. Deselect those positions that you don't want to change.

    - To have the system skip positions you don't want changed, choose None from the Selection pop-up list.

    - To have the system change a few positions from a longer list, deselect the positions you want to update. Choose Invert from the Selection pop-up list. The application selects the formerly deselected positions and visa versa.

11. Make any necessary changes to the position data, replacing the displayed data by entering new data or choosing the appropriate data from the supplied List of Values. You can adjust data for individual positions.

    For example, you might change the Status, to change an existing status from Frozen to Proposed.

Making Further Changes to Selection Criteria

If you change the Selection Criteria after you update positions, and then again choose Create New, a dialog appears asking if you want to replace the positions and overwrite any manual changes you've made. Choose No to keep your changes and Yes to replace the positions.

> **Note:** If you are changing the Selection Criteria to model different results, you might create two Position Update sets, submit the set you want and delete the other.

Making the Final Changes

12. Before submitting your update, you must choose a Datetrack Mode, which

determines how the application records the update.

- **Correction** replaces all information for the position(s) you are updating
- **Update** end-dates the original position record, creating a new record to hold your changes and thus preserving the history of the changes to the position
- **Update-Insert** creates a new record inbetween two existing records (for instance, a past version and a current or future version of the position), likewise preserving the position's entire history
- **Update-Override** behaves like a Correction, but replaces only an update rather than the entire history of the position

13. Choose the Submit button to update the position(s) and to update the database.

    When you submit the set of positions, the system refreshes the position data with the exception of the Change List items and any manual changes you've made. It refreshes the data based on the Effective Date.

    The system validates the position(s) using the same validation process it does when you create a position with the Position form. You can query the new position in the Position form and continue making further changes, for example, to Position Extra Information.

Correcting Errors

If you updated more than one position, the successfully updated positions display a Status of Complete. You can take no further action on these positions.

If the system encounters an error--such as a duplicate position name--when you submit the set, the Status changes to Error New Record(s).

The Process Log lists the errors.

To correct an Error:

1. Locate the position on the Original tab that has a status of Error New Record(s).
2. Choose the New tab to view the corresponding positions. Locate the positions that have a status of Error New Record(s).

   If you have updated many positions, you can sort the New folder by the Status column so that all Error New Record(s) are grouped together.
3. Review the change list items and make any necessary corrections.

   You might see an error, for example, if information that's required to complete a position is missing.
4. After correcting the information, resubmit the set of positions.

Submitting Updates at Different Times

When you're updating many positions, you may not have the information on hand that you need to create and submit all the positions. You can process the information at different times by:

- Setting up different sets of positions based on which ones require further data entry
- Including all the positions in the same batch, but deselecting positions on the New tab

You can deselect a position and submit the other positions. The deselected ones display a Pending New Record(s) status. Complete the information, select the positions, and choose the Submit button.

If your set includes many positions, you can sort the New folder by the Status column so that all Pending New Record(s) positions are grouped together.

Position Hierarchies

Position Hierarchies

You may also want to relate positions to each other. You can relate positions by forming multiple hierarchies of positions to show reporting relationships.

You can create and maintain your reporting structures in two ways. You can use the:

- Position Hierarchy window
- Position Hierarchy Diagrammer

The Hierarchy Diagrammer, included with Oracle HRMS, enables you to create your position hierarchies graphically, and make intuitive drag-and-drop changes to them.

Position hierarchies are very like organization hierarchies. You can set up a primary hierarchy and multiple secondary hierarchies to show reporting lines, including 'dotted line' reporting, and to control access to information. Position hierarchies are dated, so you can create future-dated versions, and can retain previous versions for historical information.

Change and Delete Positions from the Hierarchy

You can add new positions to an existing hierarchy, or change positions in a hierarchy. You can also delete a position hierarchy, but you must check that it is not tied in to other working areas of the system.

Creating a Position Hierarchy

Use the Position Hierarchy window to create position hierarchies. Always define hierarchies from the top position down.

> **Note:** You can use the Hierarchy Diagrammer to create your position hierarchy graphically.
>
> See:Introduction to Hierarchy Diagrams, page 2-94

Each position can belong to any number of hierarchies at the same time, but can only appear once in any hierarchy.

You should define the primary reporting hierarchy as part of your implementation of positions. The first version of your hierarchy should show your reporting structures when you implement Oracle HR.

Tip: You may find it easier to define the Hierarchy using the top position and one other. Then you can add other positions into the hierarchy when you make your definitions in the Position window.

To create a position hierarchy:

1. Enter a unique name, and check Primary if it is your main reporting hierarchy.
2. Enter the version number and start date for the hierarchy.

   You can copy an existing hierarchy. See: Copying an Existing Hierarchy, page 3-54
3. Query the top position name into the Position block.

   The Holder field displays the name of the person who holds this position. If there is more than one holder, this field displays the number of holders. You can choose the List icon from the toolbar to display the list of holders.

   The Worker Type field displays the worker type of the person who holds this position. The worker type is similar to person type, except that the worker type only displays the person's active worker type. For example, the worker type for an *Employee.ex-applicant* person type is *Employee*.
4. In the Subordinates block, select the immediate subordinates for the top position.
5. To add organizations below one of these immediate subordinates, check the Down check box for the position.

   The Position block now displays the position you selected. You can add subordinates to *this* position. To return to the previous level, check the Up check box.

   Important: The list of positions from which you can select in the Subordinates block includes positions that are already in the hierarchy. If you select such a position, you will move it and all its subordinates within the hierarchy.

Creating a New Version of a Position Hierarchy

To create a new version of an existing hierarchy:

1. Query the name of the hierarchy.
2. In the Version field, use the Down Arrow to move through existing versions of the hierarchy until you reach a version number for which no other data appears. Enter

the start datefor the new version.

> **Note:** Overlapping versions of a hierarchy cannot exist. Whenever you enter a new version of a hierarchy, the system automatically gives an end date to the existing version. Oracle HRMS retains the records of obsolete hierarchies so you do not lose any historical information.

You can copy an existing hierarchy. See: Copying an Existing Hierarchy, page 3-54

3. Query the top position name into the Position block.
4. In the Subordinates block, select the immediate subordinates for the top position.
5. To add positions below one of these immediate subordinates, check the Down check box for the position.

   The Position block now displays the position you selected. You can add subordinates to *this* position. To return to the previous level, check the Up check box.

Copying an Existing Hierarchy

Use the Position Hierarchy window to copy an existing hierarchy.

To copy an existing hierarchy:

1. Enter or query the name and number of your new hierarchy version and choose the Copy Hierarchy button.
2. Select the name and version number of the hierarchy you want to copy.

   Details of this hierarchy then appear in the Position and Subordinates blocks. You can change these.

Deleting a Position Hierarchy

Use the Position Hierarchy window to delete a position hierarchy. You must check that the hierarchy is not tied in to other working areas of the system before you try to delete it.

To delete a position hierarchy:

1. Remove any subordinate positions from the hierarchy, starting at the lowest level.
2. Check whether other versions of the hierarchy exist. If they do, you must delete

these other versions first.

3. Check whether the position hierarchy is referenced by a security profile. If it is, you must first delete this link.

4. Query the position hierarchy in the Position Hierarchy window and choose Delete.

Changing a Position Hierarchy

Use the Position Hierarchy window to change a hierarchy. You can change position hierarchies in three different ways.

To view which positions are in a hierarchy:

1. Query the hierarchy and version you want to view.

2. In the Position region, enter a query on the Name field.

3. Check the Exists in Hierarchy check box and run the query. You can now scroll through the positions currently in the hierarchy in the Name field.

To add new positions to an existing hierarchy:

1. Query the hierarchy and version you want to change.

2. Query the parent position for the one you want to add.

3. Select the new position in the Subordinates block.

> **Important:** The list of positions from which you can select in the Subordinates block includes positions that are already in the hierarchy. If you select such a position, you will move it and all its subordinates within the hierarchy.

To change the top position in an existing hierarchy:

1. Query the hierarchy and version you want to change.

2. Query the new top position.

3. Select the previous top position in the Subordinates block.

To move a position and all its subordinates within a hierarchy:

1. Query the hierarchy and version you want to change.

2. Query the new parent position for the one you want to move.

3. Select the position to move in the Subordinates block.

Running the Position Hierarchy Report

The application includes a standard Position Hierarchy Report to display the relationship between the positions in a hierarchy. The report also lists the current holders of each position in the hierarchy.

You run reports in the Submit Requests window.

To run the Position Hierarchy Report:

1. In the Name field, select Position Hierarchy.

2. Enter the Parameters field to open the Parameters window.

3. Enter the effective date for which you want to see the report.

4. In the Position Structure field, select the hierarchy. If there are multiple versions, select a version.

   If the effective date lies between the version's start and end dates, the report shows information for the effective date. If it lies outside these dates, the report shows information for the start date of the version.

5. In the Parent Position field, select the highest position in the hierarchy that you want to see on the report.

6. Enter Yes in the Holders Shown field to see holders' names.

7. If there are more than ten holders, you see the number of holders only.

8. Choose the Submit button.

   You can review the eligibility criteria and its run results by performing a standard query after entering the criteria name in the form.

   You can create more than one set of eligibility criteria. The application saves the criteria and its run results, storing the criteria name and the employee's selection status on the Person Mass Action Extra Information (Mass Salary and Transfer In) or the Position Mass Action Extra Information (Realignment and Transfer Out).

Job and Position Evaluation

Jobs and Position Evaluation

Evaluation systems, which compare the responsibilities of roles to help in the definition of grades, are common in large enterprises. The Hay Evaluation System, which is used internationally, is an example. Directly or indirectly, the evaluation can also contribute to setting compensation levels.

Evaluation systems normally use a set of formal and systematic procedures to perform a comparison of roles. As such, evaluationis primarily concerned with the definition of the relative status of a role, and not with a set of absolutes. The objective of all evaluation systems is to place a role in a grading or salary structure.

There are two main types of evaluation system:

FactorKey roles are examined factor by factor and a rank comparison order produced for each factor. A complex comparison of weighted factors then follows.

PointsA wider range of factors is used.

RatingEach factor is weighted and has a numerical scoring system. The total points scored determines the placement of the role in a grade or salary structure.

These systems might incorporate benchmarking, where a few key roles determine the rank of all the others. Grades and compensation levels are determined after the evaluation and ranking of the jobs.

In Oracle HRMS, you can set up one or more evaluation systems for jobs or positions. You use a descriptive flexfield to hold the evaluation information, which provides the flexibility for you to use the evaluation system of your choice.

Creating an Evaluation System

To create an evaluation system:

1. Decide whether to hold the evaluation information for jobs or for positions, depending on your own definitions of employees' roles within the enterprise model.

2. Define values for the Lookups Types EVAL_SYSTEM (evaluation system name) and EVAL_SYSTEM_MEAS (the units in which to measure the evaluation). If you use more than one system, you can define multiple values to provide a list of values in the Job Evaluation and Position Evaluation windows.

3. Define the structure and segments of the Additional Evaluation Details descriptive flexfield, which holds the evaluation information. This descriptive flexfield displays

on the Job Evaluation and Position Evaluation windows.

For example, you could define the following segments:

- Responsibility
- Problem Solving
- Know How
- Related Grade

If you are using more than one evaluation system in your enterprise, you should make the flexfield segments *context sensitive* to the evaluation system. Context sensitive segments ensure that each system has its own distinct set of evaluation information.

Your system administrator usually carries out this task as it requires access to parts of the system that control how Oracle Human Resources works.

Entering Evaluation Information

Enter evaluation scores and details in the Job Evaluation or Position Evaluation window.

To enter a job or position evaluation:

1. Select the evaluation system used to evaluate this job or position.
2. Enter the overall score and select the units of measurement.
3. Enter the date of the evaluation.
4. Open the descriptive flexfield window, and enter the information it prompts you for.

Workforce Intelligence for Jobs and Positions

Employee Job and Position Detail Workbook

This workbook allows you to analyze aspects associated with jobs and positions within your organization. It allows you to:

- Compare requirements for positions across Business Groups.
- Analyze requirements for positions against those held by employees or applicants.

Parameters

This workbook has no parameters.

Worksheets

This workbook has the following worksheets:

- Workforce by Job and Position
- Work Choices by Job
- Work Choices by Position
- Job and Position Special Information

Workforce by Job and Position Worksheet

This worksheet enables you to analyze assignment details for employees within an organization by job and position.

Business Questions

Who in my workforce occupies a particular job or position?

Work Choices by Job Worksheet

This worksheet enables you to analyze deployment factors for jobs, people in specific jobs, and job applicants.

Business Questions

What are the working preferences of my employees?

Headings and Calculations

This worksheet uses the following calculations:

- **Calc Job**

  Populates the Calc Job page item in the worksheet. It returns the Deployment Factors Job name, but if that is not present, it returns Employee Assignments Job Name.

Work Choices by Position Worksheet

This worksheet enables you to analyze deployment factors for positions, people in specific positions, and position applicants.

Business Questions

What are the working preferences of my employees?

Headings and Calculations

This worksheet uses the following calculations:

- **Calc Job**

  Populates the Calc Job page item in the worksheet. It returns the Deployment Factors Job name, but if that is not present, it returns Employee Assignments Job Name.

Job and Position Special Information Worksheet

This worksheet enables you to analyze special information types associated with jobs and positions.

Business Questions

What other information is relevant to a particular job or position?

4

People Budgets and Costing

People Budgets and Costing Overview

HRMS Budgeting Overview

Human Resource budgets enable you to manage personnel costs efficiently. Using Oracle HRMS, you can create and approve budgets that help you:

- Manage expenditures on HRMS entities
- Adjust forecasts
- Plan for future costs

You can estimate expenditures for the following HRMS entities:

- Job
- Position
- Grade
- Organization
- Open

> **Note:** The Open budget entity allows you to create a budget for any combination of job, position, grade, or organization. You cannot use control budget features with the Open entity.

You set up your budget based on your organizational culture and business requirements. For commercial enterprises, the fiscal budget is typically based on company revenues, and can change during the fiscal year. For public sector enterprises,

such as city governments and educational institutions, budgets must comply with legislation-mandated funding requirements. See the following section, Control Budgeting.

You can correct your budget as funding or expenditures change. You can create a new version of a budget based on an existing version at any time. You can enter budgets directly into the database, or route budget worksheets for approval online. You can monitor money, FTE, headcount, and hours (up to three in a single budget). You can enter fixed amounts for each line item, or calculate the value of each entry as a percentage of the total allocation.

You can specify any date range you want for your budget's fiscal period, and use currency values of any length, with variable decimal point placement. If you budget by position or organization, you can use an organization hierarchy to delegate your budget among organization managers.

HRMS Cost Analysis Overview

Oracle products installed in your organization determine how you can use costing information.

See: Labor Costs in Oracle HRMS, page 4-53

Entries you make in cost allocation flexfield segments enable you to map costing data to general ledger account codes and distribute costs across your enterprise.

See: The Cost Allocation Key Flexfield, page 4-62

HRMS allows you to override default cost allocations on five levels, to account for exceptions and temporary costing arrangements:

- Payroll
- Element link
- Organization
- Assignment
- Element entry

Cost data at the payroll level when you always charge your costs to the same company or the same ledger.

See: Data Costed at the Payroll Level, page 4-56

Cost data at the element link level when you define costed, fixed costed, or distributed costing types for earnings and deductions.

See: Data Costed at the Element Link Level, page 4-56

Cost data at the organization and assignment levels when costs are typically allocated to the same cost center.

See: Data Costed at the Organization and Assignment Levels, page 4-61

Cost data at the element entry level when you want costs for an individual element entry, such as a timecard entry, to override costs entered at any other level.

See: Data Costed at the Element Entry Level, page 4-62

RetroCosting ensures that costing information you processed in payroll runs is correct, identifying discrepancies attributable to processing errors or changes to your implementation structure.

Reporting on Cost Analysis

Once you have completed the costing process, you can run the Cost Breakdown report to see the distribution of payroll calculation results, with corresponding General Ledger and labor cost details. You can run two versions of this report:

- **Cost Breakdown Report for Costing Run**: shows summarized costing totals for a specified costing process
- **Cost Breakdown Report for Date Range**: shows summarized costing totals for a particular consolidation set, payroll set, or payroll over a specified interval

See: Run the Cost Breakdown Report, page 4-73

Control Budgeting

If you mark your budget as a control budget, you can:

- Integrate your budgeting process with accounting by posting your budget to Oracle General Ledger and/or Grants Management
- Run reports to compare budget estimates with actual expenditures or get a snapshot of under budgeted line items, at any stage of the budget cycle
- Enforce business rules that reflect the policies of your enterprise, such as ensuring that funding is available before entering assignments or approving budget reallocations

A successful HRMS Control Budgeting implementation typically requires consultation and coordination with professionals working in other modules:

- General Ledger (for chart of accounts code combinations)
- Payroll (for costing structures that generate actuals)
- Grants Accounting and Labor Distribution (optionally, if your enterprise performs grants accounting)

Budgeted Amounts

You can distribute estimated costs to Oracle General Ledger by linking budget elements to their corresponding chart of accounts codes. Using budget sets, you can parse a budget element and link it with multiple codes, enabling you to account for all funding sources that pay for a given cost. You post your budget to GL by mapping HRMS costing flexfield segments to general ledger account code segments.

See: Defining Budget Characteristics, page 4-19

Budget Sets: In the real world, employee packages consist of many elements, for example, earnings, supplemental earnings, taxable benefits, direct payments, and employer liabilities. You can create as many budget sets as you need to reflect this structure and represent your employee packages, then attach them to the positions in your budget to provide data links to elements and the accounts that pay for them.

See: Defining Budget Sets, page 4-15

Budgeting FTE and Headcount: You can create budgets that monitor or control FTE or Headcount. Use business rules in combination with position FTE or budgeted FTE to ensure that position control issues a warning or halts processing if hiring or promoting a person would put you over allotted FTE. You can also configure the application to recalculate and update Assignment Budget Values for FTE automatically when determining factors change, such as working hours or frequency.

See: Budget and Control Positions Using FTE in Position Control, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Recalculating Assignment Budget Values, page 4-17

Budgeting Positions: Once you post a position control budget, you can add a position to it and enter budget allocations to the level of the budget period when you define or update the position. Using a default budget set you link to budget characteristics, you can also provide default element and funding source information.

See: Entering Budget Values by Calendar Period in Completing a Budget Worksheet, page 4-27

Actuals and Commitments

HRMS costing and budgeting features work together to enable you to compare budgeted amounts with actuals. When you run Oracle Payroll, HRMS costing processes allocate personnel expenditures to cost centers, general ledger codes, and/or labor distribution codes. HRMS accumulates the balances using pay elements you can also specify in your budget for tracking actuals. You track budget commitments in a similar way, earmarking budget elements for commitment tracking. You can then compare your actual costs to budgeted amounts, commitments, and projections. See the following section, Reporting on Control Budgets.

Integration Considerations

Your implementation team is responsible for planning the required correspondence between budgeted and costed elements. Organizations frequently account for the cost of positions by placing people in multiple assignments, especially organizations that must meet the stringent requirements of grants accounting. Multiple assignments enable you to specify costing percentages in a different way for each assignment.

Here are some of the questions your implementation must address:

- Which General Ledger Chart of Accounts code combinations are available for your use?
- Which accounts fund the positions, jobs, organizations, or grades in your enterprise?
- How do you plan to distribute costs so that actuals generated by payroll runs correspond to budgeted amounts?
- Does your enterprise use Grants Accounting?
- Do you need to create multiple assignments and specify costing proportions at the assignment level, in order to meet regulations or reporting requirements?
- Are you using HRMS costing or Labor Distribution?
- Is Labor Distribution processing commitments, or is HRMS?
- Which combination of Payroll-, Link-, Organization-, Assignment-, and Element Entry-level costing best fits the way your enterprise tracks costs?

Reporting on Control Budgets

Oracle HRMS provides reports to enable you to monitor the status of active control budgets. Control budget reports are especially useful during the analysis and adjustment stages of the budget cycle. Run *Report Under Budgeted Entities* to flag line items whose projected costs exceed budgeted amounts. You can then reallocate resources from over budgeted entities.

Status reports display information about the primary entity (typically positions) for specified time periods, enabling you to analyze budgeted, actual, committed, projected, and balance amounts. You can also view differences between budgeted and actual amounts expressed as a percentage.

For a high level budget summary, run the *Position Summary* report to display the status of all positions within an organization. If you need to focus on a specific pay element, run the *Entity Element Summary* report. To view specific positions within an organization, broken out by pay element, run the *Position Element Detail* report. If you

work in a position control organization, run the *Organizational Position Summary* report based on an organization hierarchy.

> **Note:** You can restrict the scope of most reports to specific types (over budgeted, under budgeted, or both).

See: Control Budget Reports, page 4-43

Key Concepts

To broaden your understanding of HRMS Budgeting and Costing, see:

Using Oracle HRMS Budgeting, page 4-9

Migrating a Budget to Oracle HRMS, page 4-34

Completing a Budget Worksheet, page 4-27

Entering Non-Approved Budgets, page 4-24

Routing Budget Worksheets and Position Transactions, *Oracle HRMS Enterprise and Workforce Management Guide*

Reallocating and Reserving Budget Resources, *Enterprise and Workforce Management Guide*

Business Rules, *Enterprise and Workforce Management Guide*

Transaction Type Wizard, *Oracle HRMS Enterprise and Workforce Management Guide*

Process Rules Reference, *Oracle HRMS Enterprise and Workforce Management Guide*

Routing and Approval Rules Reference, *Oracle HRMS Enterprise and Workforce Management Guide*

People Budgets and Costing

Oracle HRMS provides all the features you need to manage your human resource position budgets. You can create a budget for a variety of HR expenditures, from monetary expenditures, such as salary and benefits, to headcount and full-time equivalency, all within the same budget.

Can I maintain budgets for all my Oracle HRMS work structures?

Oracle HRMS enables you to define a budget for jobs, positions, grades, and organizations; you can also define a budget using any combination of these work structures.

Can I manage salary budgets using Oracle HRMS?

Yes. using Oracle HRMS you can add salary estimates to the work structures in your

budget. Using *budget sets*, you can link budget values to the elements you use to record pay values. Management reports enable you to compare actual expenditures against budget.

How do I enter a budget into the application?

You use a *budget worksheet* to enter budget data into the application. You express this data as an amount or as a percentage of the total allocated amount for the budget. You can also add a position to an existing budget and enter budget data to the period level when you create or update the position.

Can I delegate a budget worksheet to a manager in my organization?

Yes, provided that you budget for positions or organizations, since these work structures enable the use of organization hierarchies. You can start a budget worksheet, then delegate the worksheet to a manager in your organization hierarchy.

Can I route a budget for approval?

Using Oracle Workflow, you can route a budget for approval. You decide your list of approvals based on routing lists, a supervisory hierarchy, or a position hierarchy.

When an approver approves a budget worksheet, you apply the budget worksheet to the database for the budget to become an active budget. Management reports track the difference between actual expenditures and an active budget.

You can also work in non-approval mode if your organization does not require online approval of budgets.

How can I migrate legacy budgets to Oracle HRMS?

Using the Oracle HRMS Concurrent Manager, a system administrator can schedule a batch process to migrate a budget from previous releases of Oracle HRMS to the new budget function. The budget you migrate is pre-approved and does not need to be routed for approval.

Can I reallocate control budget resources from one line item to another?

Oracle HRMS enables you to reallocate excess resources to positions, jobs, grades, or organizations that need them. A web-based interface displays information about budgeted, actual, committed, and available amounts per budget period, enabling you to reallocate budgeted amounts using automatic workflow routing and approval.

How do I validate budgets or reallocations against my organization's business practices?

When you apply your approved budget worksheet or reallocation transaction to the HR

database, the application uses business rules you configure or define to compare the values in the transaction with data you provide about positions, budgets, or assignments. You configure each rule to display a warning, halt processing, or ignore the validation failure.

How can you use cost analysis to support your business activities?

You can use Oracle HRMS to:

- Estimate labor costs from current compensation definitions
- Project future labor costs by modelling organizational change and salary reviews

You can also use Oracle Payroll to accumulate actual payroll costs for transfer to Oracle General Ledger. When you run a payroll, Oracle Payroll calculates any prorated results if the cost center changed during the payroll period. You can set a dynamic trigger to create prorated cost results that reflect cost center changes.

Budgeting

Using HRMS Budgeting

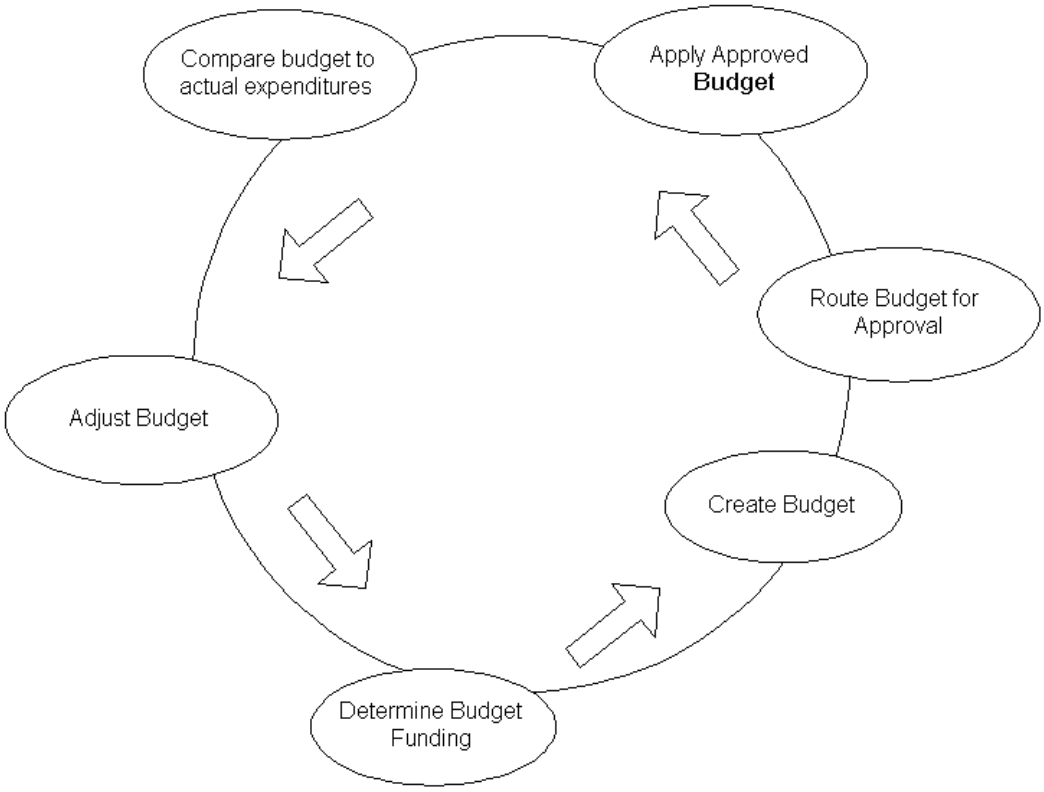
The following sections provide an overview of how to use Oracle HRMS budgeting features and integrate your budgeting process with Oracle General Ledger, Oracle Grants Accounting, and Oracle Labor Distribution:

- The Budget Cycle
- Migrating an Existing Budget to Oracle HRMS
- Creating and Approving Budgets
- Reallocating and Reserving Budget Resources
- Enforcing Policy with Business Rules
- Control Budgeting in a Grants Environment

The Budget Cycle

For many enterprises, the budgeting process is a time-consuming, cyclical venture. Oracle HRMS provides support for all phases of the budget cycle:

Stages of the Budget Cycle



For each stage, Oracle HRMS features are available to help you manage your budget.

- **Budget Funding**: Use Oracle General Ledger to report on available funds based on revenue or legislated funding. Run Oracle HRMS control budget reports to determine budget excesses and deficits for the fiscal year.

- **Budget Entry**: Use HRMS Budgeting to define the properties of your budget and enter values.

- **Budget Approval**: Route budget worksheets for approval using Oracle Workflow. On approval, apply the budget to the database.

- **Budget Analysis**: Schedule HRMS control budget reports to compare budgeted amounts with actual expenditures, commitments, and projections.

- **Budget Adjustments**: You can correct an active budget during the fiscal year, reallocating resources to other line items as needed, or reserving resources so that you cannot use them.

Migrating an Existing Budget to Oracle HRMS

If your enterprise implemented Oracle HRMS prior to Release 11*i*, you can migrate legacy budgets to the current version of HRMS. You can use the migrated budget as the basis for a new budget. See Migrating a Budget to Oracle HRMS, page 4-34.

Creating and Approving Budgets

If your enterprise operates in an environment where budgets are subject to an approval process, you can route a budget online through a hierarchy of approvers. On approval, you apply the budget to the database to activate it. See Completing a Budget Worksheet, page 4-27.

In enterprises without a formal approval process, you can enter budget values directly. See Entering Non-Approved Budgets, page 4-24.

Post a control budget to Oracle General Ledger to make it available to your financial organization, or integrate HRMS budgeting with Oracle Grants Accounting.

See Posting a Budget to Oracle General Ledger as a Batch Process, page 4-35.

Reallocating and Reserving Budget Resources

In organizations that maintain strict control over the creation or modification of positions, managers cannot exceed budgeted amounts. Budget reallocation (the ability to transfer available resources from one control budget line item to another during a given budget period) provides some flexibility to an otherwise strict system of controls. When excess money, FTE, hours, or headcount is available, such as when a position becomes vacant or goes unfilled, you can reallocate resources from over-budgeted positions, organizations, grades, or jobs to under-budgeted entities.

You can also reserve resources so you cannot use them, and reallocate resources to non-budgeted entities. See Reallocating and Reserving Budget Resources, *Enterprise and Workforce Management Guide*.

Enforcing Policy with Business Rules

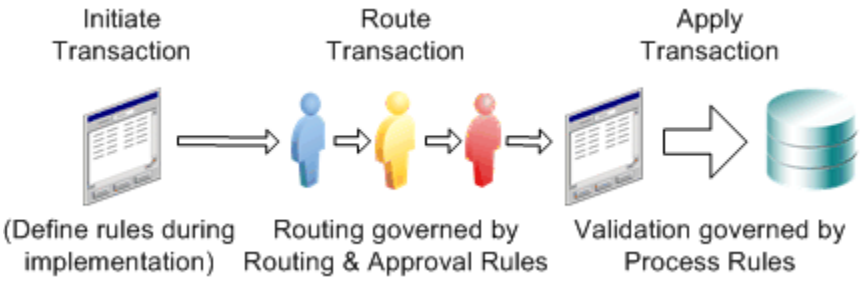
Configurable business rules (also called *process* rules) enable you to validate position transactions, budget worksheets, and reallocation transactions on approval, ensuring that the proposed actions adhere to organization policy.

The life cycle of a transaction consists of three stages:

- Initiate
- Route and Approve
- Apply to the database

As you see in the figure below, the application invokes process rules when you apply your transaction to the database.

Process Rules



When you apply a business transaction to the database, process rules check the values in the transaction. The rules trigger a warning or error if, for example, budgeted amounts are insufficient to fund a new position, the donated amount in a reallocation is above a specified threshold, or if donated FTE exceeds a specified limit.

See Business Rules, *Enterprise and Workforce Management Guide*.

Control Budgeting in a Grants Environment

Oracle HRMS works with Oracle Grants Accounting to create reservations when you approve and post your budget (funds checking). When you assign a person to a budgeted position and calculate commitments, you automatically relieve reservations and create encumbrances in grants. As payroll runs generate actuals, Grants Accounting records the expenditures against award budgets.

> **Note:** Commitments in HRMS are similar to encumbrances in grants accounting.

Under Budgeted Entity Reporting

For controlled budgets, you can run a report to identify the entities (positions, organizations, jobs, or grades) that the application projects to be under budgeted. The way in which the application calculates whether an entity is under budgeted depends on the budget measurement unit.

The budget measurement units fall into two categories:

- **Cumulative:** Money and hours
- **Non-cumulative:** All other units such as FTE, headcount, and all user defined budget units.

Calculations for Cumulative Budget Units

If the budget measurement unit is Money then an entity is under budgeted if:

(Budgeted Salary + Reallocated Salary) < (Actual Salary + Commitment Salary)

If the budget measurement unit is 'Hours' then an entity is under budgeted if:

(Budgeted Hours + Reallocated Hours) < (Actual Hours)

> **Note:** Budgeted Amount, Reallocation Amount, Actual Amount and Commitment Amount of the Cumulative Units is calculated by a cumulative process (summation) for a given date range.

When a date range is given with a cumulative unit, the above calculation is run only once for the given date range to find the under budgeted entities

Calculations for Non-cumulative Budget Units

If the budget measurement unit is FTE, Headcount or any other non-cumulative unit, then an entity is under budgeted if:

(Budgeted Amount + Reallocated Amount) < (Actual Amount)

> **Note:** Budgeted Amount, Reallocation Amount, Actual Amount of the Non-Cumulative Units is calculated as the amount defined as of the given date.

When a date range is given with a Non-Cumulative Unit, the above calculation will be run for all possible dates with in the date range to find the Under Budgeted Entities.

Items for Under Budgeted Calculations

Items that are used in the above calculation are explained in detail below:

- **Budgeted Salary** is the sum of the values of individual elements for the budget sets defined for the each budget detail and the corresponding controlled budget. The values are prorated if input start date or end date is between the budget elements start and end dates.

- **Reallocated Salary** is the value obtained after the funds are reallocated using the budget pool. If the budget unit is Money or Hours or Aggregate then the reallocated amount is prorated.

- **Actual Salary** is the sum of each element type for all the assignment actions that lie within the supplied period.

- **Commitment Salary** is the sum of the commitment amounts for each assignment and the element type.

- **Budgeted Hours** is the sum of the budget values for all the budget periods, for all the budgets falling within the date range you specify. The values are prorated if input start date or end date is between the budget elements start and end dates

- **Reallocated Hours** is the value obtained after the funds are reallocated using the budget pool. If the budget unit is Money or Hours or Aggregate then the reallocated amount is prorated.

- **Actual Hours** is the sum of the normal hours taking into consideration the frequency for all the assignments.

- **Budgeted Amount** is the sum of the budget values for all the budget periods, for all the budgets falling within the date range you specify.

- **Reallocated Amount** is the value obtained after the funds are reallocated using the budget pool.

- **Actual Amount** is the sum of assignment budget values for all the assignments that coincide with the effective date.

Defining Budgetary Calendars

You define calendars for human resource budgets in the Budgetary Calendar window.

Once you define the calendar you cannot:

- Change the start date. Set the start date to let you enter any budget history information you want to enter.

- Define years with an earlier start date than the start of the calendar.

In each calendar you define as many years as you require. You do not create a new calendar for each year. You just add new periods to the calendar.

To define a budgetary calendar:

1. Enter the name, and start date for your calendar.

   Check that the start date year is early enough to cope with your historic data. Once you define the calendar, you cannot change the start date.

2. Select a period type. If you select Semi-monthly, enter a value between 1 and 28 in the Midpoint Offset field to determine the start date of the second time period each month. For example, if you enter the value 15, the second time period each month begins on the 16th.

3. Save the calendar.

   The system automatically creates the time period details. You can alter the default names for each time period.

4. If you want to add years to, or delete years from, the end of the calendar, choose the Change Calendar button.

5. When you have defined your calendars, you are ready to define your budgets.

Renaming Period Types

Budgetary calendars and payroll calendars are based on a period, such as a Quarter or a Year. Standard period types are predefined with the system. If you want to use a different name for a period type, enter the name in the Period Types window.

You cannot remove the names that are already defined, but you can insert a new record and select the appropriate Number Per Year.

To rename a period type:

1. Insert a new record.

2. Enter the new name for the period type.

3. Enter the number of time periods to occur per year.

4. Save your new period type.

Defining Budget Sets

Using budget sets, you can link budget entries you record in a budget worksheet to the pay elements you use to record compensation and other values. You can run Oracle HRMS reports to compare a budgeted value for an element to the run result recorded for that element.

You also use budget sets when you migrate a budget from releases of Oracle HRMS prior to Release 11*i*.

See: Migrating a Budget to Oracle HRMS, page 4-34

Use the Budget Set window to define a default budget set. You can add or delete elements to a set in the budget worksheet.

To define a budget set:

1. Enter or query a Budget Set.

2. Choose the Elements tab.

3. Select an Element you want to include in the budget set.

4. Enter the Default Percentage of the budget entry value that is distributed to the element.

5. Repeat steps 3 and 4 for each element in the budget set.

6. Choose the Funding Sources tab.

7. Choose the left or right arrow button to select an element in the budget set.

8. Do one of the following:

   - If this element is funded from your GL, then click in the Cost Allocation field to open the Cost Allocation Flexfield window and enter the cost allocation code combination by selecting a value for each applicable field

   - If this element is funded by a grant, then enter the Project, Task, Award, Expense, Organization (PTAEO) combination by selecting a value for each applicable field. In future releases of Oracle HRMS, this combination will be validated against your Oracle Grants setup.

     Note: The PTAEO fields are only displayed if Oracle Grants is installed.

9. Enter a distribution percentage for each funding source record.

10. Save your work.

Entering Assignment Budget Values

At the Business Groups level, you can enter the default value of an assignment for each type of budget you have defined. For particular assignments, you override this default value in the Assignment Budget Values window.

If you have not entered a default value at the Business Group level, you must be careful to enter a value for every assignment. If there is no value entered in the Assignment Budget Values window, that assignment is not counted when calculating actual values for the budget.

> **Note:** If you are using Workforce Intelligence or Oracle HRMS Intelligence, assignments without budget values are included when calculating actual values for the budget.

See: Workforce Intelligence in the *Oracle HRMS Configuring, Reporting, and System Administration Guide.*

To enter an assignment budget value:

1. If necessary, use the DateTrack facility to set the effective date for the assignment budget values. You must re-query the assignment budget values into the window if you change the effective date.

2. Select a budget type in the Units field and enter the value of the assignment for this budget in the Value field. Oracle HRMS displays the effective dates of the assignment budget value in the Effective Dates From and To fields.

Recalculating Assignment Budget Values

When data changes occur that can impact Assignment Budget Values (ABV), such as changes to working hours, frequency, or other terms of work, you can configure the application to update ABV automatically using the Configuration Values function.

For example, if standard working hours are 40 per week, and you enter an assignment with 40 hours per week, FTE is 1. If the worker's hours change to 30 per week, recalculating the budget value changes FTE to 0.75.

Organization policy or legislative requirements can dictate a unique implementation. Company rules or contract terms may calculate FTE in prescribed ways. Some locations may add overtime to standard working hours, or deduct unpaid sick time. The flexibility and scalability of the configuration process enables you to meet business requirements. You decide which ABV to maintain (typically a derived value, such as Full Time Equivalent or Percent Full Time), and how to calculate the value.

A concurrent process (Calculate Assignment Budget Values) also enables you to manually update ABV after performing batch changes, such as mass assignment updates or initializing assignment data during implementation.

See: Running the Calculate Assignment Budget Values Process, *Oracle HRMS Enterprise and Workforce Management Guide*

Perform three configuration steps for each budget measurement unit you want to maintain automatically:

1. **Enable an Assignment Budget Value**: Activate maintenance for the budget measurement unit of your choice.

2. **Configure Date Collection**: Specify the events group and/or custom function you have created to log system events, such as changes to assignment records.

3. **Specify a Recalculation Formula**: Select a FastFormula you write to calculate the

specified ABV.

You can override predefined configurations at the business group level. In Configuration Values, query the module Assignment Budget Value Maintenance.

1. **Enabling an Assignment Budget Value**

   The module uses the configuration type Maintenance Configuration to enable and disable maintenance for a specified budget value unit of measurement.

2. **Configuring Date Collection**

   The module uses the configuration type Process Definition Configuration to collect a list of event dates for processing, using an events date source you specify. The list of dates enables the process to recalculate and update ABV for the triggering record as of the effective date, including future changes that impact the budget value.

   On the Add Configuration Value page, configure your process definition by specifying:

   - Configuration Name
   - Budget Value Unit Of Measurement
   - Event Dates Source (Event Group and/or Custom Function)

   If you have implemented Oracle Payroll, you can define a payroll event group of the type Retro to log system events.

   See: Defining Event Groups, *Oracle HRMS Payroll Processing Management Guide*

   For information on defining a custom function, see the PL/SQL User's Guide and Reference.

3. **Specifying a Recalculation Formula**

   On the Add Configuration Value page, specify the budget value formula (QuickPaint FastFormula) you created to calculate the specified ABV.

   See: Oracle FastFormula Overview, *Oracle HRMS FastFormula User Guide*

Setting Up Default Assignment Costing for Budgets

Follow the process below to set up default assignment costing for budgets.

> **Note:** If you write a FastFormula to select default assignment costing accounts and proportions, the formula overrides the default assignment costing for the budget.

See: Writing Formulas for Default Assignment Costing, *Oracle HRMS FastFormula User Guide*

To set up default assignment costing for budgets:

1. Set the following profile option to Yes:

   - HR: Default Assignment Costing

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

2. Define a position control budget.

   See: Defining Budget Characteristics, page 4-19

3. Set up funding sources for the positions in your position control budget.

   See: Completing a Budget Worksheet, page 4-27

   When you link a position to an assignment, the default assignment costing accounts and proportions are calculated from the position control budget.

Defining Budget Characteristics

You use the Budget Characteristics window to define the properties of a budget. Once you define the properties, use the Budget Worksheet or Budget Details window to make budget entries.

Use the Budget Characteristics window to:

- Select the primary budget entity. You can choose job, position, grade, organization or a combination of these work structures.
- Select the budget measurement units, for example money or headcount.
- Define the fiscal period of the budget.
- Indicate which budget elements you want to use for tracking actuals and commitments.
- Map Cost Allocation flexfields to Oracle General Ledger account codes if you post the budget to Oracle General Ledger.

> **Note:** The application freezes the budget characteristics once you create a budget worksheet or budget version for that budget.

To define budget characteristics:

1. Enter the budget name and select a budget calendar.

2. Check the Control Budget check box if this budget is for control purposes, for example, position control.

   Note: You can define only one control budget per budget measurement unit type within a period for a business group.

3. If this is a controlled budget, check the Transfer to Grants check box if you want to transfer budget information to the Oracle Grants management system.

   Note: This check box is only displayed if you have Oracle Grants installed.

4. Choose the Budget Characteristics tab.

5. Enter the Fiscal Period for this budget in the From and To fields.

   Note: You can enter allocations for budget periods within the fiscal period when you complete the budget worksheet.

6. Select the Currency of the budget. If you do not select a currency the default currency for your business group is used.

7. Optionally, select a default budget set from the list. Position users can use the information in the budget set to provide budget data at the element and funding source level when they create or update positions.

8. Select the Primary Entity of this budget, such as Position.

   Select Open to use a combination of Job, Position, Grade, or Organization. You choose the Open entity more infrequently, typically for budgets migrated from earlier versions of Oracle HRMS (11.0 and later). If you choose the Open entity, you need to enter all line items manually (Populate All does not work). You cannot create a control budget using the Open entity, and Report Under Budgeted Entities will not work.

   Note: The list of primary entities is seeded with the product and you cannot extend this list.

   You must enter budget values in the worksheet for the primary entity. If you select position as the primary entity, you can limit the position to a position in a grade using the budget worksheet.

9. Select the Budget Style.

- Select **Top Down** if you enter the total Allocated amount for each budget measurement unit when you complete the budget worksheet. You can distribute the Allocated amount between the line items in the budget version.

- Select **Bottom Up** if you do not enter the total Allocated amount for each budget measurement when you complete the budget worksheet. In this case, the application rolls up the value for all the budgeted line items to create the total Allocated amount for the budget version.

10. Select an Organization hierarchy if your primary entity is position or organization and you want to delegate the budget to managers in a organization hierarchy.

    - The application displays the version of the organization hierarchy in the Version field.

    - When creating a control budget you must mark the organization hierarchy for position control.

      Note: If you do not select an organization hierarchy, the budget worksheet displays all positions and organizations in the business group.

11. Select the highest organization for which you are budgeting in the Starting Organization field if you select an organization hierarchy.

    Note: You cannot enter budget values for any organizations in the organization hierarchy above the starting organization.

12. If you want to limit the grades that can be selected for budgeting to only those marked as valid for the associated position or job, then check the Valid Grade Required check box.

    See: Entering Valid Grades for a Job or Position, *Oracle HRMS Enterprise and Workforce Management Guide*

    Note: If you save a budget as valid grade required, you cannot change it back to an all grade budget.

13. Select the first Budget Measurement Unit for which you are budgeting, such as money or headcount.

    - Oracle HRMS delivers the following seeded measurement units: Money, Hours, Headcount, Full Time Equivalent, and Percent Full Time Equivalent. You cannot extend these units, but you can use the User Types and Statuses window

to copy and rename a unit by selecting the BUDGET_MEASUREMENT_TYPE lookup value.

> **Important:** Although it is theoretically possible to set up budgets that measure money, hours, headcount, and FTE for many combinations of entities, fiscal periods, and budget calendars, this approach does not reflect best practice. To achieve meaningful results in reports, Oracle recommends using a given measurement unit with a single entity, fiscal period, and budget calendar. This alignment is essential when you implement Workforce Intelligence reporting, such as Workforce Budget Management.

14. Select an aggregation method in the Aggregate field to control how the application rolls up budget totals by budget period for each budget measurement unit.
    - **Accumulate** defines the total as the value accumulated in the budget period. If you select Money as a budgeting unit, you must select Accumulate as the aggregation method.
    - **Average** defines the total as the average value for the budget period. You typically use this method for non-monetary units such as FTE or Headcount, where allocations can fluctuate widely from one period to the next.
    - **Maximum** defines the total as the maximum value for the budget period.
15. Save your work.

Defining Budget Elements to Track Actuals and Commitments

You can compare your budgeted amounts to actual expenditures and projected commitments for any fiscal period. In order to track actuals or commitments, you must specify a method as part of your setup:

- You must specify an Input Value to track actuals.
- You can choose to calculate commitments based on Input Value, Salary Basis, or a FastFormula rule you define.

> **Note:** If you define a budget element to track both actuals and commitments (Type = "Both"), you must specify Input Value as the method. You can define the same element twice (once for each Type) to specify a different method for calculating commitments.

You calculate commitments from the Concurrent Manager by running the Calculate Commitment batch process.

To define budget elements:

1. Enter or query a budget in the Budget Characteristics window.

2. Choose the Elements tabbed region.

3. In the Type field, specify whether you want to use the element to track Actuals, Commitments, or Both.

4. In the Classification field, optionally select a payment classification from the list, such as Earnings, Supplemental Earnings, or Employer Liabilities.

   Note: This field filters the Element list to display only those elements matching the selected classification. Since budgets track payments, do not select a deduction classification here.

5. In the Element field, select the element you want to use to track actuals and/or commitments.

6. If you selected Actuals or Both in the Type field, specify an Input Value to track the element.

7. If you selected Commitments or Both in the Type field, do one of the following to specify a calculation method:

   - Select an Input Value to the element, such as Amount or Pay Value.
   - Activate the Salary Basis check box.
   - Select a FastFormula.

8. Select a Default Frequency to specify the default unit of time for which you calculate commitments (day, week, month).

9. Optionally, enter an Overhead % to add a percentage of the commitment calculation result to the total commitment amount.

10. Save your work.

Mapping Cost Allocation Flexfields to Oracle General Ledger Accounts

You can transfer a completed budget to Oracle General Ledger. To enable the transfer, map Oracle HRMS cost allocation flexfields to general ledger account codes.

Note: Budget sets enable you to link each budget element to multiple GL account codes. To account for multiple funding sources, attach

budget sets to line items in your budget.

You transfer budget worksheets marked for transfer to GL automatically, when you apply the budget to the database. If you use Direct Budgeting (without routing), run the concurrent process Budget GL Posting.

See Posting a Budget to Oracle General Ledger as a Batch Process, page 4-35.

To map cost allocation flexfields to Oracle General Ledger Accounts:

1. .Enter or query a budget in the Budget Characteristics window.
2. .Select a GL budget in the GL Budget field.

   Note: The application activates the Transfer to GL check box automatically.

   You must select a GL budget in the GL Budget field to enable the GL Segment Map tabbed region. The GL budget is empty, ready to receive budget data, because a counterpart with a GL Manager responsibility creates the budget for you.

3. If your budget originates in Oracle Public Sector Budgeting, then Public Sector Budgeting transfers the budget to GL and HRMS Control Budgeting transfers only commitments to GL. If this is the case, activate the Transfer only commitments to GL check box.
4. Choose the GL Segment Map tabbed region.
5. Select an HRMS Costing Segment for each corresponding GL Chart of Accounts segment.

   When you post your budget, the funding source distribution percentages you specify per element in your budget sets enable the appropriate allocation amounts to display in GL, broken down by GL account codes.

   See Setting Up an Oracle HRMS Budget for Transfer to Oracle General Ledger, page 4-25.

6. .Save your work.

Entering Non-Approved Budgets

If your enterprise does not approve budgets online, you use the Budgets window to define versions of a budget that you created using the Budget Characteristics window.

Note: You enter budgets that are approved online through Oracle Workflow in the Worksheet window.

To enter non-approved budgets:

1. Select a Budget Name in the Find Budgets window. Or, find the budget by selecting the fiscal period of the budget in the From Date and To Date fields.
2. Choose the Find button to open the Budgets window.
3. Enter the date range for which you are allocating an amount to a budget measurement unit in the From and To fields.
4. Enter the amount allocated for each budget measurement unit in the budget.
5. Choose the Open button to open the Budget window where you can enter budget values for each line item in the budget.

   See: Completing a Budget Worksheet, page 4-27

   If a budget is marked as transfer to GL or transfer to Grants, and has not yet been transferred, then the Transfer to GL, or, if Oracle Grants is installed, Transfer to GL/Grants button is enabled.

   Note: When you create or update a position, you can add it to a control budget version and enter budget data to the period level on the Budgets tab.

Setting up an Oracle HRMS Budget for Transfer to Oracle General Ledger

You can transfer an active HR budget to Oracle General Ledger so that funds can be reserved in the General Ledger for the HR budget.

As a prerequisite, you must define the GL budget before you define the corresponding HR budget.

Contact your finance department to have a user with a General Ledger responsibility set up the GL budget.

To set up an HR Budget for transfer to Oracle General Ledger:

1. Define the budget in Oracle General Ledger.
   - Open the Define Budget window.
   - Enter a budget name.

- Select a Status of Open to indicate the budget is available for update and entry.
- Enter the budget period.
- Choose the Open Next Year button.
- Save your work and close the Define Budget window.

2. Define the budget in Oracle HRMS.
   - Open the Budget Characteristics window.
   - Enter a budget name.
   - Select the GL budget name you set up earlier in the GL Budget field.
   - Complete the budget definition.
   - Map Cost Allocation flexfields to GL account codes
   - Save your work and close the Budget Characteristics window.

   See: Defining Budget Characteristics, page 4-19

3. Complete the budget worksheet.
4. Route the budget for approval, if required.
5. Apply the completed budget to the application.

   Note: If you enable budgetary control for the GL Ledger associated with this budget, the application automatically posts the budget to the GL if there are no errors. If you do not enable budgetary control, a budgeting user must manually post the data.

6. Review any budget posting errors in the Process Log Navigator window.

Setting Up Budget Worksheets

Use the Worksheet Characteristics window to define the properties of a budget worksheet.

To set up the budget worksheet:

1. Enter the Name of the budget worksheet.

2. Select a worksheet Mode. Choose:

   - **Edit & Make a New Version** to copy an existing budget version to a new version that you can edit.

   - **Correct Old Version** to correct an existing version of a budget.

   - **Start from Scratch** to start a new budget worksheet.

3. Select a Propagate Method to control how the application re-calculates budget entries if you update the total amount allocated to a budget measurement unit. Choose:

   - **Retain Value** to leave the budget entry value unchanged when you update the allocated amount.

   - **Maintain Percentage** to update the budget entry value as a percentage of the allocated amount. For example, if you increase the allocated amount by 10%, the value for each budget entry also increases by 10%.

   - **User Preference** retains the budget entry value (either an amount or a percentage) and re-calculates the derived value. For example, let's say you budget 500,000 for the positions in an organization. For position 1, the budget is 50,000. If you increase the total allocated amount for the organization to 550,000, the budgeted amount for the position remains 50,000 but the percentage changes from 10% to 9%.

4. Select the Budget Name of the budget you are editing.

5. Select the budget Version if you are correcting or copying an existing budget version.

6. Choose the Create Worksheet button to open the Worksheet window and close the Worksheet Characteristics window.

   Note: You complete the budget worksheet by entering values or percentages for each line item in the budget. You can save the worksheet to your workflow inbox, route the worksheet for approval, or delegate the budget to another manager in an organization hierarchy.

See: Completing a Budget Worksheet, page 4-27

Completing a Budget Worksheet

Enter budget details for the line items in your budget using the Worksheet window. Or,

delegate the budget worksheet to another manager in your organization hierarchy.

See: Delegating Budget Worksheets, page 4-32

To complete a budget worksheet:

1. Define the properties of a budget worksheet in the Worksheet Characteristics window or open an existing worksheet from your inbox.

2. Edit the name of the Worksheet, if necessary.

3. Enter the date you will post the budget to the application in the Action Date field.

4. Enter the Start Date and End Date of this budget version.

5. Choose the Worksheet Characteristics button to review the properties of the budget worksheet in view-only mode.

   - Choose OK to dismiss the Worksheet Characteristics window.

6. Enter the Allocated amount for each budget measurement unit. As you allocate resources to budget line items, the application calculates the amount available for allocation.

   Note: You can enter budget values without first entering the total allocated amount.

7. Choose the Budget tab.

8. Choose the Populate All button to load all line items into the worksheet for the primary budget entity.

   - Choosing Populate All does not load position transactions into the worksheet. You can add position transactions to the worksheet by selecting the position transaction from the list of values. If the application has not updated the position transaction to the application when you apply the budget worksheet, the Apply Budgets process writes an error to the Process Log Navigator.

   - For budgets with a primary entity of job or grade, the Populate All button loads all entities of the selected type in the Business Group.

   - Line items for which you can budget are limited by organization hierarchy if you select an organization hierarchy when defining the characteristics of the budget.

     Note: If the worksheet mode is Edit and Make a New Version or

Correct Old Version, the Populate All button loads the line items from the selected budget version into the worksheet. Choose the Populate All button before selecting any line items into the worksheet.

9. Use the Folder Tool to change the order and width of the columns in the worksheet, hide fields, or rename prompts.

   Note: You can use the same folder for multiple worksheets if the budget is of the same primary entity, measurement unit, and budget style.

10. Select one or more line items to include in your budget.

    Note: For example, select a position if you are budgeting by position.

11. Enter a budget amount for each line item, or enter a percentage of the total amount allocated for the budget measurement unit.

    The application supports the entry of currency values of any length with variable decimal point placement.

    Note: You can divide the budget amount for the line item by budget periods in the Budget Details window.

    You cannot budget for the same line item twice. Selecting a line item into the worksheet removes the item from the list of available entities.

12. Choose the Apply button to propagate any changes to the total allocated amount throughout the worksheet based on the propagation method you select.

    Note: If you change the allocated amount, but do not apply the changes, the application automatically calculates the new totals the next time you open the worksheet after saving it to your inbox, or when you post the completed budget to the application.

Entering Budget Values by Calendar Period

You can divide entries in the budget worksheet into periods. For example, you could divide a position budget of 40,000 into 10,000 per fiscal quarter.

You define budget periods when you set up your budget calendar.

To enter budget values by period:

1. Enter a value for each budget line item in the Worksheet window.
2. Choose the Periods button to open the Budget Details window.
3. Choose the Periods tab.
4. De-select the coordination check box if you do not want this window to query the detail records for the budget period when you open the window.
5. Select the Start Date and End Date of the budget period.
6. Enter the budget amount or percentage of the allocated amount for each period.
7. Choose the Next Budget Unit or Previous Budget Unit button to move between budget line items.

   Important: While it is theoretically possible to define budget periods, commitment calculations, and payroll periods independently, without considering the relative sizes of the date ranges, this approach does not reflect best practice. Oracle recommends sizing the date ranges to one another proportionaltely. Define the budget period as the largest, then commitment calculation and payroll frequency in decreasing order of size.

   For example, you can set up quarterly budget periods of three months in length, calculate commitments on a monthly schedule, and set up a bimonthly payroll frequency. This approach avoids rounding errors, yields the most meaningful results in reports, and is essential when you implement Workforce Intelligence reporting, such as Workforce Budget Management.

   See Calculating Budget Commitments, page 4-35

   See: Defining a Payroll, *Oracle HRMS Payroll Processing Management Guide*

8. Save your work.

Entering Budget Values by Budget Set

You can link budget entries for a period to budget sets. Within a budget set, you can distribute budget values by element and by cost allocation flexfield.

To enter budget values by budget set:

1. Enter a value for each budget line item in the Worksheet window.
2. Choose the Periods button to open the Budget Details window.
3. Enter the budget amount or percentage of the allocated amount for each period.
4. Choose the Budget Sets tab.
5. Select a Budget Set.
6. Enter the budget amount or percentage of the allocated amount for each budget measurement unit in the budget set.
7. Choose the Budget Set Distribution button to open the Funding Distribution window where you can enter the percentage of the budget measurement unit amount that is distributed to an element in the budget set.
8. Choose the Elements tab.
9. Select an Element Set and Distribution percentage for the element.
10. Choose the Next Budget Set and Previous Budget Set buttons to move between budget sets.
11. Choose the Funding Source tab.
12. Do one of the following:
    - If this element is funded from your GL, then click in the Cost Allocation field to open the Cost Allocation Flexfield window and enter the cost allocation code combination by selecting a value for each applicable field

    See: Writing Formulas for Default Assignment Costing, *Oracle HRMS FastFormula User Guide*

    - If this element is funded by a grant, then enter the Project, Task, Award, Expense, Organization (PTAEO) combination by selecting a value for each applicable field. In future releases of Oracle HRMS, this combination will be validated against your Oracle Grants setup.

      Note: The PTAEO fields are only displayed if Oracle Grants is installed.

13. Enter a distribution percentage for each funding source record.

14. Choose the Next Element and Previous Element buttons to move between elements in the budget set.

15. Save your work.

> **Note:** When you create or update a position, you can add it to a control budget version and enter budget data to the period level on the Budgets tab.

Delegating Budget Worksheets

You can delegate a budget worksheet to a manager using the Worksheet window if you budget by position or organization.

To delegate a budget worksheet:

1. Start a new worksheet or edit an existing worksheet from your workflow inbox.

2. Choose the Delegate tab in the Worksheet window.

3. Select the Organization of the delegate manager.

   - The application displays the first level of organizations in the organization hierarchy beneath the current organization.

   > **Note:** You cannot delegate a budget worksheet if the primary budget entity is job, grade, or open because these entities are not linked to organization hierarchies.

4. Select the name of the delegate in the Manager field.

   > **Note:** You can only delegate a budget worksheet to one person. This person must be identified as a manager in this organization in the Manager field of the Miscellaneous tabbed region in the Assignment window. If the delegated manager does not have a workflow role, the application automatically defers sending a notification.

5. Check the Defer field to delegate the worksheet to a manager without sending a workflow notification.

6. Enter the amount or the percentage of the amount allocated for the budget measurement unit which you are delegating to this manager.

7. Use the following buttons to navigate between organizations. Choose:

   - **Populate All** to select all organizations beneath the current organization. You can delete organizations from this list without effecting the organization hierarchy.

   - **Details** to navigate one level below the current organization. Choose Details to see which organizations report to the current organization.

   - **Parent** to navigate one level above the current organization.

   - **Root** to navigate back to the starting organization.

8. Save your work.

   Note: The delegate manager receives a workflow notification and can open the worksheet from the workflow inbox. The delegate manager can edit any line item that has been delegated, including items which have already received a budget entry. Or, the manager can further delegate the worksheet to a subordinate manager.

Posting Completed Budgets

You post a budget to transfer a complete and approved budget worksheet from the HRMS worksheet tables to the HRMS budget tables. After you post a budget, you can begin to run variance reports that track actual expenditures and commitments against budget.

Note: If you enter budgets using the Budgets window instead of the Worksheet window, this indicates that your enterprise does not approve budgets online in Oracle HRMS using workflow. In this case, you do not need to post a completed budget because budget data is entered directly into the budget tables.

To post a completed budget using the Workflow Inbox:

1. Open the Routing window.

2. Choose the Apply Transaction field.

3. Choose OK.

4. Open the Process Log Navigator window to view any posting errors.

Migrating a Budget to Oracle HRMS

If your enterprise maintained budgets in Oracle HRMS prior to Release 11*i* you can migrate existing budgets to the new budget tables. Migrating an existing budget saves you data entry time when the components of a budget vary little from year to year.

As a prerequisite to migrating a budget, you must define the default budget set that you want to associate with this budget. Budget sets let you map a budget by fiscal period to HRMS elements and cost allocation flexfields.

See: Defining Budget Sets, page 4-15

Once you migrate a budget, you use the Budget Worksheet to copy and edit a new version of the budget.

You run the Migrate Budget Data process from the Submit Requests window. Alternatively, you can migrate budgets using the Budget Migration module available from the Navigator.

To migrate a budget to Oracle HRMS:

1. Select the Migrate Budget Data batch process in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Optional: select the Budget Name of the budget you are migrating.

   Note: The budget migration process migrates all legacy budgets if you do not select a specific budget name.

4. Select the default budget set associated with this budget in the Budget Set Name field.
5. Choose OK.
6. Complete the batch process request and choose Submit.

   Note: You can view any errors encountered during the batch process in the Process Log Navigator window.

7. Query the budget by name in the Budget Characteristics window.

   You can now modify the properties of the migrated budget and create a new budget worksheet based on the values in the old budget.

   Note: The application treats migrated budget data as pre-approved.

You cannot route a migrated budget for workflow approval. Since migrated budgets have a primary entity of *Open*, you cannot use a migrated budget for purposes of position control.

See: Completing a Budget Worksheet, page 4-27

Posting a Budget to Oracle General Ledger as a Batch Process

You run the Budget GL Posting batch process to transfer budget worksheet data from Oracle HRMS to Oracle General Ledger.

Note: If you apply the budget worksheet to the database from your workflow inbox, Oracle HRMS automatically transfers the data to the General Ledger and you do not need to run the Budget GL Posting process.

You run reports from the Submit Requests window.

To post a budget to Oracle General Ledger as a batch process:

1. Select the Budget GL Posting process in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Select the Budget Version you are posting to the General Ledger.
4. Select a Validate Mode--either Yes or No--to indicate if you want the application to post the budget to the GL or to validate the budget without posting the data.
   - Select Yes to validate the budget without posting the data to the GL.
   - Select No to post the data to the GL. The application writes any errors encountered during posting to the Process Log Navigator window.
5. Choose the OK button.
6. Complete the batch process request and choose Submit.

Calculating Budget Commitments

You run the Calculate Commitment batch process to calculate the projected expenditures for a budget over a budget period.

You run reports from the Submit Requests window.

To calculate budget commitments:

1. Select the Calculate Commitment report in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Select the name of the Budget Version for which you are calculating commitments.
4. Optional: select a position in the budget version for which you are calculating commitments. If you do not select a position, the process calculates commitments for all positions in the budget version.
5. Enter the date range for which you are calculating commitments in the Commitment Start Date and End Date fields.
6. Optional: select the Frequency for which you are calculating commitments, such as weekly or quarterly. If you do not select a frequency, the Calculate Commitment process uses the frequency of the budget calendar you attach to the budget.
7. Choose the OK button.
8. Complete the batch process request and choose Submit.

Posting Budget Commitments to Oracle General Ledger

You run the Commitment GL Posting batch process to transfer budget commitments from Oracle HRMS to Oracle General Ledger.

You run reports from the Submit Requests window.

To post budget commitments to Oracle General Ledger:

1. Select the Commitment GL Posting process in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Select the Budget Version you are posting to the General Ledger.
4. Select a Validate Mode--either Yes or No--to indicate if you want the application to post the budget commitments to the GL or to validate the commitments without posting the data.
   - Select Yes to validate the budget commitments without posting the data to the GL.
   - Select No to post the commitments to the GL. The application writes any errors encountered during posting to the Process Log Navigator window.

5. Choose the OK button.

6. Complete the batch process request and choose Submit.

Running the Relieve Commitments Request Set Process

You run the Relieve Commitments concurrent request set process to recalculate commitments and post the results to Oracle General Ledger. The request set combines the Calculate Commitments process and the Commitment GL Posting process.

You should run the Relieve Commitments request set periodically after certain events--such as salary payments, or the hiring or termination of employees--post revised actuals to the General Ledger.

You run this process from the Submit Request Set window.

To run the Relieve Commitments request set:

1. Select the Relieve Commitments process in the Request Set field.

2. Click in the Parameters field to open the Parameters window.

3. Select the name of the Budget Version for which you are calculating commitments.

4. Optional: select a position in the budget version if you want to calculate commitments for a single position.

   Note: If you do not select a position, the process calculates commitments for all positions in the budget version.

5. Enter the date range for which you are calculating commitments in the Commitment Start Date and End Date fields.

6. Optional: select the Frequency for which you are calculating commitments, such as weekly or quarterly.

   Note: If you do not select a frequency, the Relieve Commitment process uses the frequency of the budget calendar you attach to the budget.

7. Choose the OK button.

8. Complete the batch process request and choose Submit.

Reallocating and Reserving Budget Resources

Overview

Oracle HR Budgeting enables you to reallocate control budget resources from one line item to another, as you identify excess and deficit amounts. You can also reserve amounts by line item, so you cannot use them. You do this using a web-based interface, available from the Navigator by selecting Budget Reallocation. The following sections describe the steps in the process:

1. Find a Control Budget
2. Create a Reallocation Folder
3. Create a Transaction
4. Identify Donors/Periods/Receivers
5. Route the Folder for Approval

The remaining sections provide information about related activities, including viewing or acting upon pending and approved transactions, configurable business rules, migrating pre-existing reallocations, and troubleshooting in the Process Log.

Find a Control Budget

On the Find Budget page, you search for control budgets that are in effect on a date you specify. You can further restrict the search by specifying an entity (Position, Job, Grade, Organization) or budget measurement unit (Money, FTE, Headcount, Hours, or user-defined Share Type).

Only one control budget can be in effect on a given date for each entity/unit combination, and each budget can allocate up to three units. The application displays the search results in rows, each row displaying information about a budget, entity, and unit.

Create a Reallocation Folder

After selecting a search result row, you can create a new folder to hold transactions relating to the selected budget and entity/unit combination. A folder is a virtual container for your transactions. When you approve a folder, you approve all transactions within it (partial approval is not possible).

Create a Transaction

The Add Transactions, Donors, and Receivers page displays your folder, where you can create a new transaction. The page displays information about Donor and Receiver entities, Unit, Reserved Amount, Transaction Amount, and Transaction Balance.

- **Unit**: the budget measurement unit, such as Money or FTE.
- **Reserved Amount**: the portion of this line item's allocation that you cannot use, even for the line item itself.
- **Transaction Amount**: the total number of units you are transferring.
- **Transaction Balance**: the difference between the Donor and Receiver amounts. If a positive number, you have not yet assigned all donated units to Receivers. If a negative number, you have assigned more units to Receivers than you have donated. The transaction balance must be zero before routing or approving the folder.

Identify Donors/Periods/Receivers

Next you select line items with excess resources to donate. In addition to displaying amounts available for donation, the page displays information about the organization, location, and job, as well as budgeted, actual, committed, donated, and received amounts.

You can also view unapproved pending donation amounts. The application does not subtract Unapproved Donation amounts from Available amounts. Nevertheless, future-approved transactions can reduce available amounts before you approve your folder, causing your transaction to fail.

On the Donor Periods page, you can donate amounts at the budget period level. Here you can specify both Reserved and Donated amounts.

> **Note:** Within one transaction, a single donor can transfer to one or more receivers, and multiple donors can transfer to one receiver. Many donors cannot transfer to many receivers.

On the Add Receivers page, you can select entities from a list to receive your donation. Here you also specify the Start and End Dates of the transfer (both of which must fall within the date range of the budget's Fiscal Period), and the amount of the transfer. Receiver entities do not have to be in the selected budget, though they must have the same entity as that of the Donor.

Route the Folder for Approval

The Routing Options page appears when you submit your transaction for approval. There you can save the folder to your Inbox, reject it, forward it to a qualified recipient, or (if you are a designated approver) apply the folder to the database. You configure default routing options and approvers for budget reallocation in Standard Setup, and routing and approval rules for automated workflow in Advanced Setup.

View Pending Reallocations

Each Search Results row on the Find Budget page gives you the option to view all unapproved transactions relating to the entity/unit combination. Here you can search for reallocation folders by name, or display them all. The application displays information about the transaction amounts and current owners of each folder. You can select one or more folders, and perform the following actions on them:

- **Notify Budget Manager**: sends an FYI Notification to all budget managers in your business group. Using the Notify Self option below, any budget manager can take ownership of the folder and work on it.
- **Notify Self**: sends the selected folders to yourself. This action always takes ownership of the folder.
- **Delete**: removes the selected folders from the system, canceling the transactions.

Notification recipients can link to the folder and work on it.

> **Note:** Though budget reallocation notifications do appear in the Workflow Notifications Inbox, they do not contain links to the folder. To link to the folder, workflow recipients must navigate to the Advanced Worklist, using a Workflow User Web Interface responsibility via Self Service.

View Approved Allocations

In each Search Results row of the Find Budget page, choosing a View Approved Reallocations icon takes you to a page where you can view all approved transactions relating to the entity/unit combination. Here you can view transaction amounts and balances.

> **Note:** One caveat when you work with the Oracle web-based interface: the Select All option selects only those rows on the current page. If your list is too large to display on a single page, Select All will not affect rows on other pages.

Configurable Business Rules

You can define process rules to ensure that budget reallocations adhere to the business practices of your organization. The application invokes process rules and validates reallocation transactions when you apply folders to the database.

Migrating Pre-Existing Reallocations

The application migrates any pre-existing budget reallocations automatically, when you install a patch containing the budget reallocation function for the first time. You can review the migrated folders on the View Pending Reallocations page, and notify budget managers, notify yourself, or delete, as described above. Migrated transactions have no owner, but anyone can use the Notify Self option to take ownership.

> **Caution:** The application deletes any pre-existing non-control budget reallocations on installation. If you have reallocated or reserved budget amounts for non-control budgets, make notes of these transfers before installation.

Troubleshooting in the Process Log

Budget Reallocation is available as a View option in the Process Log. Here you can troubleshoot failures to apply reallocation transactions by reviewing error messages and details relating to folders, transactions, donors, and receivers.

For information about troubleshooting in the Process Log, see Using the Process Log, page 4-41.

Using the Process Log

The process log displays information that can help you correct errors. For example, you can refer to the log for errors encountered when:

- Applying a budget from a worksheet
- Applying budget data to General Ledger
- Reallocating budget resources
- Migrating budget data
- Identifying entities that are under budget
- Applying a position transaction
- Copying or updating positions
- Posting commitments to GL

Use the Process Log window to learn more about an error.

To display error information:

1. From the View list, select a data set (such as Position Update).

2. Locate and expand the folder in the left pane for the records you want to view.

   A Summary View describes the status of the records listed in the containing folder.

3. If necessary, continue navigating the records to the one that contains the error (designated by a red stop light icon).

   If the window where you originally entered the data contained tabbed regions, a separate entry shows the status of the records contained in each tabbed region.

   The Detail View helps you further identify a record and correct the error contained in it. For example, if the system validates data for a newly copied position and encounters invalid data in Work Choices, the Detail View displays the Work Choices flexfield so that you can review the data and then correct it.

4. If necessary, return to the window where you originally entered the data and correct the error. After correcting the error, you can apply the data or resubmit the process.

Budget Reporting

Control Budget Reports

You run control budget reports as part of the management stage of the budget cycle, enabling you to compare your estimates with actuals and commitments. With the information that reports provide, you can prepare for the next cycle, adjusting budgets where appropriate.

Summary of Available Reports

HRMS provides the following control budget reports:

Control Budget Reports

Concurrent Process Name	Results
Budget Period Position Detail	Reports on a budget you specify. Includes budgeted, actual, committed, projected, and balance amounts for each position, per measurement unit and budget period.
Entity Element Summary	Reports on an element and entity you specify. Includes budgeted, actual, committed, projected, and balance amounts, per measurement unit, in a given time period. You can filter the results to display all, over budgeted, over and under budgeted, or under budgeted entities (entity type).
Position Element Detail	Reports on an organization and/or position you specify. Includes budgeted, actual, committed, projected, and balance amounts by position, per measurement unit and pay element, in a given time period. You can filter the results to display all, over budgeted, over and under budgeted, or under budgeted entities (position type).

Position Summary	Reports on an organization you specify. Includes budgeted, actual, committed, projected, and balance amounts by position, per measurement unit, in a given time period. You can filter the results to display all, over budgeted, over and under budgeted, or under budgeted entities (position type).
Organizational Position Summary	Reports on all organizations in the business group. Includes budgeted, actual, committed, projected, and balance amounts by position, per measurement unit, in a given time period. You can filter the results to display all, over budgeted, over and under budgeted, or under budgeted entities (position type).
Report Under Budgeted Entities	Reports all entities lacking sufficient budget for the budget period containing the effective date. Includes budgeted, reallocated, actual, committed, and under budgeted amounts for each under budgeted entity. You can restrict the scope to display a specific organization hierarchy and starting organization.

Terminology

Most reports are in status report format. Status reports enable you to review budgeted, actual, committed, and projected amounts. Report Under Budgeted Entities, on the other hand, identifies line items in your budget where projected costs exceed budgeted amounts. Status reports tell you the amount of money, FTE, grades, or hours you have allocated and spent per entity, within a given budget *version*. Report Under Budgeted Entities tells you which entities lack sufficient budget within a given budget *period*.

Budgeted: The amount you allocated to the line item, derived from the budget itself.

Actual: The amount already paid during the fiscal period as of the effective date, derived from past payroll runs.

Committed: The amount your enterprise obligates itself to pay for the remainder of the fiscal period (subsequent to the effective date). The application calculates commitments by considering assignments, salaries, element entries, commitment elements you have specified, and future payroll runs.

Projected: The total amount you expect to pay to the entity for the entire duration of the budget, derived by adding Actual and Committed amounts.

Variance: The difference between the amount you budgeted and the projected amount, derived by subtracting Projected from Budgeted amounts.

> **Note:** HRMS Budgeting allows you to create multiple budgets that are in effect at the same time. The sole restriction is that only one control budget per budget measurement unit can exist in the same business group on the same date. Therefore, avoid budgeting for the same entities in more than one budget. Control budget reports display rolled-up sums from all budgets in effect, which could result in misleading data.

Running Report Under Budgeted Entities

For control budgets, you can identify the entities that the application projects to be under budgeted by running Report Under Budgeted Entities.

For details of how the report calculates which entities are under budgeted, see: Under Budgeted Entity Reporting, page 4-12

After you run the report, the application lists the under budgeted entities in the Process Log Navigator window. A notification is sent to the manager of each under budgeted entity. The manager, in turn, can correct the budget or reallocate amounts, if necessary.

You run reports from the Submit Requests window.

To report on under budgeted entities:

1. Select Report Under Budgeted Entities in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Enter a Batch Name for this under budgeted positions report.
4. Enter the Effective Date for which you want to see the report.
5. Select the Start and End Date of the period on which you want to report.
6. Select the primary entity on which to report. The Open option indicates a budget that uses more than one type of entity.

   If you do not select a primary entity, the report includes all entities: Position, Job, Grade, Organization.
7. Select the budget measurement unit.
8. If your primary entity is position or organization, you can select the organization hierarchy and the starting organization for the report.

The report determines the under budgeted entities for all positions or organizations beneath this organization in the hierarchy.

9. Choose the OK button.

10. Complete the batch process request and choose Submit.

Running the Position Element Summary Report

The Position Element Summary Report lists the budget status for an element, in a specified time period, for all positions in the Business Group.

You run reports from the Submit Requests window. After you run the report, the application displays the report in the View Output page accessible from the View Requests window.

To run the Position Element Summary Report:

1. In the Name field, select Position Element Summary Report from the list.

2. Click in the Parameters field to open the Parameters window.

3. Specify the Effective Date and Element Name for which you want to review status information.

4. Select the Position Type for which you want to see the report.

   - You can select Over Budgeted Positions, Under Budgeted Positions, Over or Under Budgeted Positions, or All Positions.

5. Optionally, enter a Variance Percent.

   - The report displays balances for those positions where the variance percent is equal to or greater than the percent you enter.

   - Variance Percent is not applicable when you select All Positions as the Position Type.

6. Enter the Start Date and End Date of the time interval you want to review.

7. Enter a unit of currency for the report.

8. Click OK.

9. Click Submit to complete the batch process request.

Running the Position Element Detail Report

The Position Element Detail Report lists the budget status for all budgeted elements, in a specified time period, for a specific position and organization.

Use the Submit Requests window.

To run the Position Element Detail Report:

1. Select the Position Element Detail Report in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Enter the Effective Date for which you want to report.
4. Enter the Organization Name for which you want the current status.
5. Enter the Position Name for which you want to see the report.
6. Select the Position Type for which you want to see the report.
   - Selections include Over Budgeted Positions, Under Budgeted Positions, Over or Under Budgeted Positions, or All Positions.
7. Enter the Variance Percent.
   - The report displays balances for those positions where the variance percent is equal to or greater than the percent you enter.
   - The variance percent is not applicable when you select All Positions as the Position Type.
8. Adjust the Start and End Date periods to be included in the report.
9. Enter a unit of currency for the report.
10. Choose the OK button.
11. Complete the batch process request and choose Submit.

Running the Position Summary Report

The Position Summary Report lists the budget status, for a specified time period, of all positions in a specific Organization.

You run reports from the Submit Requests window.

To run the Position Summary Report:

1. Select the Position Summary Report in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Specify the Effective Date on which you want status data.
4. Enter the Organization Name for which you want status.
5. Select the Position Type for which you want to see the report.
   - Selections include Over Budgeted Positions, Under Budgeted Positions, Over or Under Budgeted Positions, or All Positions.
6. Enter the Variance Percent.
   - The report displays balances for those positions where the variance percent is equal to or greater than the percent you enter.
   - The variance percent is not applicable when you select All Positions as the Position Type.
7. Adjust the Start and End Date periods to be included in the report.
8. Enter a unit of currency for the report.
9. Choose the OK button.
10. Complete the batch process request and choose Submit.

Running the Budget Period Position Detail Report

The Budget Period Position Detail Report lists the status of all Positions that are part of a specific Budget for a specified time period.

You run reports from the Submit Requests window.

To run the Budget Position Detail Report:

1. Select the Budget Period Position Detail Report in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Select the Budget Name for which you want the current status.
4. Choose the OK button.

5. Complete the batch process request and choose Submit.

Running the Staffing Budget Details Report

You can run the Staffing Budget Details report in versions of Oracle HRMS prior to 11.5.1 to compare your actual staffing levels with budgeted levels for a specified range of periods.

> **Note:** Use this report if you do not migrate an existing Oracle HRMS budget to the new budget function. For new budgets, run other reports such as the Budget Period Position Detail report.

You run reports in the Submit Requests window.

To run the Staffing Budget Details report:

1. In the Name field, select Staffing Budget Details report.
2. Click in the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Select the budget and version.
5. Select the start and end periods to include in the report.
6. Choose the Submit button.

Running the Salary Review Report

Use this report to see current and past salaries, and salary proposals, for some or all of your employees. You can restrict the employees to those assigned to a selected organization, job, position, or grade. You can also restrict the report to showing only employees receiving the maximum salary for their grade (defined by the grade rate). You can use the report to show all salaries (approved and proposed) or to show unapproved salary proposals only.

> **Note:** Use this report if you do not migrate an existing Oracle HRMS budget to the new budget function. For new budgets, run other reports such as the Entity Element Summary report.

You run reports from the Submit Requests window.

To run the Salary Review Report:

1. In the Name field, select Salary Review Report.
2. Click in the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Optionally select an organization, job, position, and/or grade to restrict the scope of the report to employees assigned to these components.
5. If you want to restrict the report to showing salary proposals, select Yes in the Unapproved Proposals Only field.
6. If you want to restrict the report to showing employees receiving the maximum salary for their grade (defined by the grade rate), or a higher salary, select Yes in the Grade Rate Maximum Only field.
7. Choose the Submit button.

Running the Organizational Position Summary Report

The Organizational Position Summary report provides summary budget information for a specified time interval, for each position-controlled organization in your business group. The application groups the results by budget measurement unit.

You run reports from the Submit Requests window. After you run the report, the application displays the report in the View Output page accessible from the View Requests window.

To run the Organizational Position Summary Report:

1. Select the Organizational Position Summary Report in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Enter the Effective Date for which you want to report.
4. Select a Position Type for which you want to see a report.
   - Selections include All Positions, Over Budgeted Positions, Under Budgeted Positions, and Over or Under Budgeted Positions.
5. Optionally, enter a Variance Percent.
   - The report displays those positions where the variance percent is equal to or greater than the percent you enter.

- The variance percent is not applicable when you select All Positions as the Position Type.

6. Enter the Start Date and End Date of the time interval for which you want to view summary information.

7. Choose the OK button.

8. Complete the batch process request and choose Submit.

Running the Entity Element Summary Report

The Entity Element Summary report lists the budget status for a specified pay element and entity in a given period. The application groups the results by entity.

You run reports from the Submit Requests window. After you run the report, the application displays the report in the View Output page accessible from the View Requests window.

To run the Entity Element Summary report:

1. In the Name field, select Entity Element Summary Report from the list.

2. Click in the Parameters field to open the Parameters window.

3. Specify the Effective Date, Element Name, and Entity for which you want to review status information.

4. Select an Entity Type from the list.

   - You can select All Entities, Over Budgeted Entities, Over and Under Budgeted Entities, or Under Budgeted Entities.

5. Optionally, enter a Variance Percent.

   - The report displays summary information for those entities where the variance percent is equal to or greater than the percent you enter.

   - Variance Percent is not applicable when you select All Entities as the Entity Type.

6. Enter the Start Date and End Date of the time interval you want to review.

7. Enter a unit of currency for the report.

8. Click OK.

9. Click Submit to complete the batch process request.

Costing

Labor Costs in Oracle HRMS

At all installations of Oracle HR, you can allocate employee costs to cost centers, GL codes and labor distribution codes. You do this by setting up segments of the Cost Allocation key flexfield to determine the windows in which users can select cost codes.

If your installation does not include Oracle Payroll or Oracle General Ledger, you must consider how to relate information on labor costs entered in Oracle Human Resources to your payroll and financial systems.

If your installation includes Oracle Payroll, you use a post-payroll run process to accumulate payroll costs by cost center, GL account code, and the labor distribution codes in use at your enterprise. For installations that also include Oracle General Ledger you can map the segments of the Cost Allocation key flexfield to the corresponding segments of the General Ledger Accounting flexfield. Another post-payroll run process is available to facilitate the transfer of information on payroll transactions to Oracle General Ledger.

Labor Cost Allocation Example

The Sample Payroll Results table below is based on the flexfield setup described in the previous topic. It displays payroll run results for four employees, using accounts and work structures identified using the Cost Allocation key flexfield. The Example Costing Process Results table shows how the Costing process allocates these payroll results:

- to accounts and cost centers, for the general ledger
- to accounts for cost centers and product lines within cost centers, for labor distribution purposes.

Sample Payroll Results table

This table displays sample payroll results for four employees:

Employee	Cost Center	Product Line	Salary	Wages	Overtime	Union Dues
Employee 1	Production	H201 100%		1,000	400	20
Employee 2	Sales	H305 100%	1,500			

Employee	Cost Center	Product Line	Salary	Wages	Overtime	Union Dues
Employee 3	Production	H201 50% H202 50%		2,000	600	30
Employee 4	Sales	H305 20%	1,000			
		H307 40%				
		H310 40%				

Sample costing results table:

This table shows the allocation of costs from the sample run results:

Account Code	Production	Sales	H201	H202	H305	H307	H310
Salaries		2,500			1,700	400	400
Wages	3,000		2,000	1,000			
Overtime	1,000		700	300			
Union Dues Liability	50						
Clearing (see note below)							

Note: Clearing account contains balancing credits for earnings Salary, Wages and Over-time, and balancing debit for deduction Union Dues.

Labor Cost Allocation Example

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previous topic. It displays payroll run results for four employees, using accounts and work structures identified using the Cost Allocation key flexfield. The Example Costing Process Results table shows how the Costing process allocates these payroll results:

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Employee 1	Production	H201 100%		1,000	400	20
Employee 2	Sales	H305 100%	1,500			
Employee 3	Production	H201 50% H202 50%		2,000	600	30
Employee 4	Sales	H305 20%	1,000			
		H307 40%				
		H310 40%				

Sample costing results table:

This table shows the allocation of costs from the sample run results:

Account Code	Production	Sales	H201	H202	H305	H307	H310
Salaries		2,500			1,700	400	400

Account Code	Production	Sales	H201	H202	H305	H307	H310
Wages	3,000		2,000	1,000			
Overtime	1,000		700	300			
Union Dues Liability	50						
Clearing (see note below)							

Note: Clearing account contains balancing credits for earnings Salary, Wages and Over-time, and balancing debit for deduction Union Dues.

Data Costed at the Payroll Level

Sometimes the labor costs from a payroll should all be charged to a particular company within your enterprise, or all be entered in a particular ledger. In this case, you select the code for the company or ledger from the appropriate segment of the Cost Allocation flexfield when defining the payroll.

Also at the payroll level, you can select codes for *suspense accounts.* A suspense account is one that collects costs from the payroll if segment entries at lower levels are missing. For example, if an employee receives a Special Production Bonus but there is no GL code for this earnings type to debit in the Cost Allocation flexfield, the cost of the bonus goes into the suspense account.

Entries of sums in a suspense account alert you to missing codes, and provide a way to hold unallocated costs until you can make manual journal entries to the correct accounts. Since codes entered in the Cost Allocation flexfield at levels below the payroll level override any entered at the payroll level, costs go to a suspense account only when the correct account codes are not entered at the element link level.

Data Costed at the Element Link Level

You enter the important costing information for an element on its links. This means that

all elements for which you must maintain costing information must have at least one link, even those that receive entries during the payroll run as indirect results of the processing of other elements.

When defining a link for an element, you select a *costable type* that determines whether the payroll run should collect the results of this link for costing purposes. By default, a link's costable type is *Not Costed*. For the results of elements that process in payroll runs to be collected for accumulation and transfer, you must change this default to a costable type of either *Costed*, *Fixed Costed* or *Distributed.*

Costable Type: Costed

When processing an element for an employee with a link marked Costed, the payroll run checks for Cost Allocation flexfield entries affecting the employee at every level - payroll, element link, organization, assignment, and element entry. Since earnings types may well receive override entries of information for labor distribution purposes at the lower levels of assignment or element entry, the costable type Costed is likely to be best for the links of elements representing earnings.

Costable Type: Fixed Costed

When processing elements marked for Fixed Costing, the system looks for costing information at the payroll, element link and element entry levels only, not the assignment or organization levels. You can, in fact, override the account code at element entry level. This is because the order of priorities for Fixed Costing is Payroll (highest priority), Element Link and finally Element Entry (lowest priority).

> **Tip:** Deduction amounts are usually irrelevant to labor distribution analyses, so elements representing deductions seldom receive lower level entries of costing information. The costable type Fixed Costing may be best for these elements' links. However, this is optional.

Costable Type: Distributed

For labor distribution analysis, you can distribute employer charges, such as employer payments for social security or employee benefits, as overhead costs to be added to employees' earnings. The links of elements representing employer charges you want to distribute in this way require the costing type Distributed.

For each employee, Oracle Payroll distributes the run results of elements with this costable type proportionally over a set of earnings types you specify. This *distribution set* of earnings types could include, for example, Wages, Overtime and Shift Pay. When you select Distributed as the costable type of a link, you must also enter the name of the distribution set of earnings over which the run results of the link are to be distributed.

See: Defining an Element or Distribution Set, *Oracle HRMS Compensation and Benefits Management Guide*

Costing and Balancing GL Accounts

For element links whose run results should go to the General Ledger, you enter in the Costing field of the link, the GL account to debit or credit, and in the Balancing field, the account to correspondingly credit or debit.

For earnings types and non-payroll payments, the GL account to debit (for example, *Salaries)* goes in the Costing field, and the account to credit (for example, *Clearing*) goes in the Balancing field. For deductions, the account to credit (for example, *Union Dues Liabilities*) goes in the Costing field, and the account to debit (for example, *Clearing)* goes in the Balancing field.

Employer Charge Distribution Example

When you give links for elements representing employer charges the costable type Distributed, the Costing process distributes the employer charges as overhead for each employee, over a set of employees' earnings.

See: Data Costed at the Element Link Level, page 4-56

This example shows how employer payments totalling $100 are distributed over a set of earnings including wages and overtime, for the cost center Production and the product lines H201 and H202. The table below shows the distribution of overhead over costs and product line totals.

Overhead Distribution for the Production Cost Center

```
Total paid to Production Cost Center as Wages run result: $3,000.0
Total paid to Production Cost Center as Overtime run result: $1,000.00
 Total for Earnings types specified for distribution: $4,000.00
Ratio for Wages distribution, Production Cost Center = 3000/4000 = .75
Wages overhead = Pension Charge $100 x .75 = $75.00
Ratio for Overtime distribution, Production Cost Center = 1000/4000 =
.25
Overtime overhead = Pension Charge $100 x .25 = $25.00
```

Overhead Distribution for Product Lines H210 and H202

```
Total paid for Product Line H201 as Wages run result: $2,000.00
Total paid for Product Line H202 as Wages run result: $1,000.00
Total paid for Product Lines 201 and 202 for Wages: $3,000.00
Ratio for Wages distribution, Product Line H201 = 2000/3000 = 0.6667
Product Line H201 overhead = Total Wages overhead $75 x .6667 = $50.00
Ratio for Wages distribution, Product Line H202 = 1000/3000 = .3334
Product Line H202 overhead = Total Wages overhead $75 x .3334 = $25.00
Total paid for Product Line H201 as Overtime run result: $700.00
```

```
Total paid for Product Line H202 as Overtime run result: $300.00
Total paid for Product Lines H201 and H202 as Overtime: $1,000.00
Ratio for Overhead distribution, Product Line H201 = 700/1000 = .7
Product Line H201 overhead = Total Overtime overhead $25 x .7 = $17.50
Ratio for Overhead distribution, Product Line H202 = 300/1000 = .3
Product Line H202 overhead = Total Overtime overhead $25 x .3 = $7.50
```

Distribution of overhead over cost center and product line totals table

The following table describes the distribution of overhead over cost center and product line totals:

Account Code	Cost Center	Product Line	Product Line
	Production	**H201**	**H202**
Wages	3,000	2,000	1,000
Employer Liability Distribution	75	50	25
Overtime	1,000	700	200
Employer Liability Distribution	25	17.50	7.50

Employer Charge Distribution Example

Employer Charge Distribution Example

When you give links for elements representing employer charges the costable type Distributed, the Costing process distributes the employer charges as overhead for each employee, over a set of employees' earnings.

See: Data Costed at the Element Link Level, page 4-56

This example shows how employer payments totalling $100 are distributed over a set of earnings including wages and overtime, for the cost center Production and the product lines H201 and H202. The table below shows the distribution of overhead over costs and product line totals.

Overhead Distribution for the Production Cost Center

```
Total paid to Production Cost Center as Wages run result: $3,000.0
Total paid to Production Cost Center as Overtime run result: $1,000.00
 Total for Earnings types specified for distribution: $4,000.00
Ratio for Wages distribution, Production Cost Center = 3000/4000 = .75
Wages overhead = Pension Charge $100 x .75 = $75.00
Ratio for Overtime distribution, Production Cost Center = 1000/4000 =
.25
Overtime overhead = Pension Charge $100 x .25 = $25.00
```

Overhead Distribution for Product Lines H210 and H202

```
Total paid for Product Line H201 as Wages run result: $2,000.00
Total paid for Product Line H202 as Wages run result: $1,000.00
Total paid for Product Lines 201 and 202 for Wages: $3,000.00
Ratio for Wages distribution, Product Line H201 = 2000/3000 = 0.6667
Product Line H201 overhead = Total Wages overhead $75 x .6667 = $50.00
Ratio for Wages distribution, Product Line H202 = 1000/3000 = .3334
Product Line H202 overhead = Total Wages overhead $75 x .3334 = $25.00
Total paid for Product Line H201 as Overtime run result: $700.00
Total paid for Product Line H202 as Overtime run result: $300.00
Total paid for Product Lines H201 and H202 as Overtime: $1,000.00
Ratio for Overhead distribution, Product Line H201 = 700/1000 = .7
Product Line H201 overhead = Total Overtime overhead $25 x .7 = $17.50
Ratio for Overhead distribution, Product Line H202 = 300/1000 = .3
Product Line H202 overhead = Total Overtime overhead $25 x .3 = $7.50
```

Distribution of overhead over cost center and product line totals table

The following table describes the distribution of overhead over cost center and product line totals:

Account Code	Cost Center	Product Line	Product Line
	Production	**H201**	**H202**
Wages	3,000	2,000	1,000

Account Code	Cost Center	Product Line	Product Line
Employer Liability Distribution	75	50	25
Overtime	1,000	700	200
Employer Liability Distribution	25	17.50	7.50

Data Costed at the Organization and Assignment Levels

When setting up an internal organization for which most or all labor costs go to the same cost center, select that cost center from the appropriate segment of the Cost Allocation flexfield when defining the organization.

For example, if the labor costs of most of the employees in the Commercial Sales Group go against the cost center Sales, select Sales from the list of cost centers when defining the organization Commercial Sales Group. This means that by default, the system accumulates labor costs for each employee assigned to the Commercial Sales Group for the cost center Sales.

Perhaps the costs of some employees assigned to this group should exceptionally be charged to a different cost center. For these employees, you can enter the correct costing information on their assignments. Entries at the assignment level override entries at the organization level.

There may also be employees regularly assigned to work in this group only part time, who work elsewhere the rest of the time. In cases like these, it is not necessary to give employees two assignments. You can enter a number of cost centers for one assignment, specifying the percentage of labor costs to charge to each:

Cost centers with specified labor costs table

The following table describes cost centers with specified labor costs:

Proportion	Seg. 1 Cost Center
50%	Sales

Proportion	Seg. 1 Cost Center
50%	Public Relations

You can also enter other types of costing information at the assignment level. For example, if a Production Department employee regularly works 80% of the time on one product line and 20% on another, you can enter this on the assignment.

Employee labor distribution table

The following table describes the employee labor distribution:

Proportion	Seg. 3 Labor Dist. Code
80%	H201
20%	H202

Notice that assignment level entries are datetracked, so you can enter changes ahead of time.

Data Costed at the Element Entry Level

When you make entries to elements with links marked as Costed for individual employees using the Element Entries window, or for many employees at once using the BEE windows, you can at the same time supply costing information.

Information entered at this level overrides any information entered at other levels. For example, if an employee has costing information on record in a Cost Allocation flexfield segment at the organization or assignment level, an entry of timecard information in this segment at the element entry level overrides the organization or assignment-level information.

The Cost Allocation Key Flexfield

When implementing and using Oracle HRMS, you make selections from the lists in the Cost Allocation flexfield segments as follows:

- When *defining a payroll,* you can select a code for the company or ledger holding the labor costs from the payroll.

- When *linking an element* representing an earnings type such as Regular Salary, a deduction such as Union Dues, or an employer charge such as a benefit plan contribution, you select a GL code that the element's results should debit or credit, and a code for the balancing GL account to credit or debit.

  Note: As well as making entries to the Cost Allocation flexfield at the element link level, you also enter on each link, essential information about the *type* of costing the system should do for the link. Available types include *Costed*, *Fixed Costed*, and *Distributed*.

  See: Data Costed at the Element Link Level, page 4-56

- When *defining an internal organization* or *entering an employee assignment*, you can select codes for the cost centers, product lines, or other structures for which to collect the labor costs of the organization or assignment.

- When *entering timecard data* in Oracle Payroll, you can select codes for accounts, cost centers, product lines, and other items listed in the flexfield segments to show how to collect labor costs for particular hours worked.

The different points at which you can make entries to segments of the Cost Allocation flexfield exist as related *entry levels*. Ranging from top to bottom, the five entry levels are shown in the table below.

See: Oracle HRMS Cost Allocation Key Flexfield Example, page 4-66

The Cost Allocation Entry Level Table

The following table describes the cost allocation entry levels:

Entry Level	Windows	Purpose of Entry
Payroll	Payroll	Identifies company or ledger to which all costs from this payroll should go.
Link	Element Link	Identifies a GL account to debit and a balancing account to credit, or for deductions, an account to credit and a balancing account to debit. Other entries can identify any other accounts into which run results of the element should go.

Entry Level	Windows	Purpose of Entry
Organization	Organization	Identifies structures such as cost centers against which to charge the payroll costs of employees in the organization.
Assignment	Assignment Costing	Identifies structures such as cost centers and product lines against which to regularly charge payroll costs of this assignment.
Element Entry	Element Entries Batch Lines	Identifies structures such as cost centers and product lines against which to charge payroll costs of an employee assignment for a period. Entries often taken from timecards.

Important: You enable a *qualifier* for each segment of your Cost Allocation flexfield to control whether it appears at a given entry level. For example, for the Cost Center segment of your flexfield, which receives entries only at the organization, assignment and element entry levels, you enable the Organization, Assignment and Element Entry qualifiers. This segment then appears only at these levels.

Overrides for the Cost Allocation Flexfield

A key feature of the Cost Allocation flexfield is that entries made to its segments at lower levels override any entries at higher levels. Thus, entries from timecards made in a particular segment at the Element Entry level override any entries to this segment made at the employee assignment, organization, link and payroll levels.

This helps to keep your costing information accurate. For example, if employees temporarily work at cost centers or on product lines different from those entered for their organizations or assignments, they can enter the cost center or product line codes together with their time worked on their timecards. On receipt of this costing information at the element entry level, the system correctly charges their time for the period, using this information rather than any entered at the organization or assignment levels.

Setup of the Cost Allocation Key Flexfield

You must define at least one segment of the Cost Allocation key flexfield; you may define as many as 30 segments. To set up this flexfield, consult the explanations and procedures given in the *Oracle E-Business Suite Flexfields Guide*.

You can control which segments of the Cost Allocation flexfield appear in each of the windows from which users can make entries to this flexfield.

Display of Flexfield Segments

Oracle HRMS implementors and users make selections from the lists in the Cost Allocation flexfield's segments at different levels, that is, in several different Oracle HRMS windows. However, in a particular window, they usually need to access only certain segments of the flexfield.

Example

When defining a payroll you need only the segment containing the companies or ledgers to which a payroll's labor costs should go. When defining a link for an earnings or deduction element, you may need only the segment containing the list of the costing and balancing GL codes. You are likely need the segment containing the list of cost centers only when defining an organization or employee assignment, or making an element entry.

You control the appearance of a Cost Allocation flexfield segment in a particular window by enabling qualifiers for the segment. When you enable a particular qualifier for a segment, this causes the segment to appear and be available for entry in a particular window, as follows:

Cost Allocation enabing segments and qualifier's table

Qualifier	Enables Segment's Appearance in
Payroll	Payroll window
Element Link	Element Link window
Organization	Organization window
Assignment	Assignment Costing window
Element Entry	Element Entries window

The following table lists the five levels, and the correct order of processing priority.

Cost Allocation qualifiers level table

Level	Qualifiers for this Level	Typical Segments Displayed at this Level
Payroll	Payroll	Company code, ledger
Element Link	Element, Balancing	GL account codes for costing and balancing
Organization	Organization	Cost centers
Assignment	Assignment	Project or product codes, or cost centers that do not map onto organizations
Element Entry	Element Entry	Project or product codes (for employees who submit timesheets)

A code entered at a lower level can override a code entered at a higher level. This means that if a segment is populated at element entry level, it overrides all other levels. You can enable as many qualifiers as necessary for a particular segment.

Oracle HRMS Cost Allocation Key Flexfield Example

The Oracle HRMS Cost Allocation Key Flexfield Example

To construct a simple example of a Cost Allocation flexfield, suppose that the departments of an enterprise each constitute a cost center. Suppose also that the general ledger accounts receiving labor costs are *Salaries, Wages, Overtime,Bonuses, Union Dues Liability* and *Clearing*.

The Clearing account in this example represents a single account set up for entry of:

- Credits, in order to balance debits to accounts for earnings types, for example *Salaries*, *Wages, Overtime* and *Bonuses*
    - Debits, in order to balance credits to accounts for deductions, for example *Union Dues Liability.*

    After running the Payroll and Costing processes, you can make journal entries to credit or debit each individual balancing account, making corresponding debits or credits to the Clearing account.

Information to be transferred to the General Ledger includes:

- The totals of salaries and wages paid in departments and cost centers are entered as debits to the *Salaries* and *Wages* accounts, and as balancing credits to the *Clearing* account.
- The total of bonuses paid to employees is entered as a debit to the account *Bonuses,* and as a balancing credit to the *Clearing* account.
- The total deducted from employees in Production and Quality Control to pay their union dues is entered as a credit to the *Dues Liability* account, and as a balancing debit to the *Clearing* account.

To collect information for transfer to the general ledger, this enterprise can construct a Cost Allocation flexfield with two segments, one for identifying cost centers and one for GL costing and balancing codes, as shown in the table below:

The Cost Allocation two segments table

Seg. 1 Cost Center	Seg. 2 GL Code
Accounting	Salaries
Production	Wages
Public Relations	Overtime
Quality Control	Bonuses
Sales	Dues Liability
	Clearing

Now suppose that for labor distribution purposes, this enterprise accumulates labor costs not just by cost center and GL account, but also by its product lines, represented by the labor distribution codes H201, H202, H305, H307 and H310. The enterprise requires product line costing information such as the following:

- Total wages paid to produce product line H201, and to check its quality
- Total paid for overtime to produce product line H201
- Total paid for salaries and bonuses to sell product line H201

Since this enterprise uses its GL codes for labor distribution, it does not need another segment to hold a separate list of codes. However, it must add another segment to hold

product line codes, as the table below shows:

Cost Allocation product line codes table

Seg. 1 Cost Center	Seg. 2 GL Code	Seg. 3 Labor Dist. Code
Accounting	Salaries	H201
Production	Wages	H202
Public Relations	Overtime	H305
Quality Control	Bonuses	H307
Sales	Dues Liability	H310
	Clearing	

Similarly, if this enterprise needed to identify for each of its payrolls a particular company or ledger to which all the information on labor costs should go, it could define another segment of the Cost Allocation flexfield such as Company or Ledger, to contain a list of the appropriate codes.

> **Note:** Installations including both Oracle HRMS and Oracle General Ledger should take the GL codes for the Oracle HRMS Cost Allocation flexfield and for the Oracle General Ledger Accounting flexfield from the same table. Installations without Oracle GL can set up their own tables of GL codes, possibly populating these tables from their existing financial systems.
>
> See: User-Defined Tables, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Subledger Accounting (SLA)

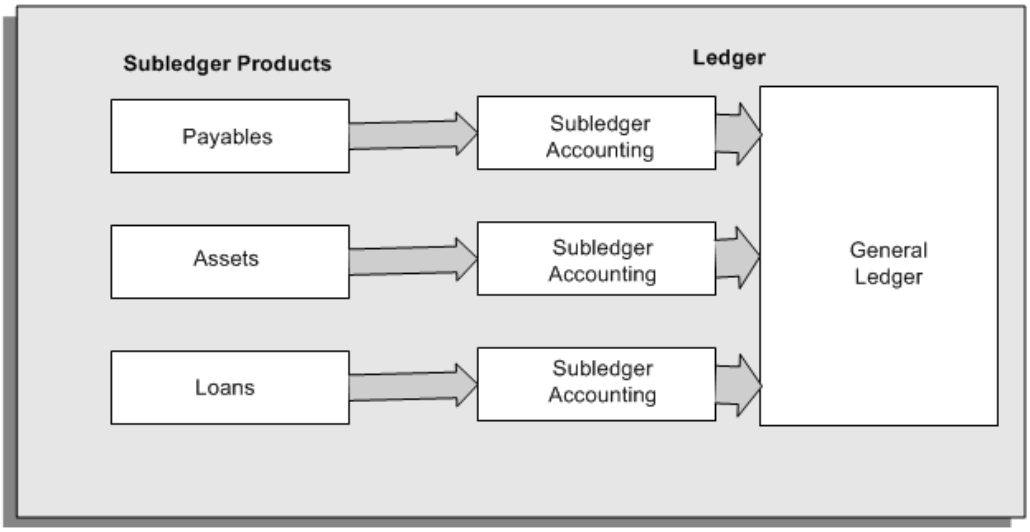
Oracle Payroll now supports subledger accounting. You can continue to transfer your costs to General Ledger (GL) but you have the additional option of transferring costs to subledgers rather than to General Ledger.

The advantages of using subledger accounting are:

- You can have multiple accounting representations for a single business event so that you can handle the difference between corporate and local audit requirements more easily.

- You can take advantage of the added level of precision that subledger accounting provides, but you can still view aggregated results at General Ledger level.

Outline of Subledger Accounting



The outline shows that subledger accounting provides an intermediate step between subledger products, and the general ledger. Subledger accounting also:

- Creates subledger journal entries and subledger journal balances for each payroll cost

- Holds each journal entry separately rather than summing together costs that have identical cost codes.

Access to Subledger Accounting from Oracle Payroll

The Subledger Accounting menus are accessible from Oracle Payroll:

- For SLA setup features, navigate to the Subledger Accounting Setups menu (available on the Payroll menu).

  See Subledger Accounting Options Setup Overview, *Oracle Subledger Accounting Implementation Guide*

  See Accounting Methods Builder Overview, *Oracle Subledger Accounting Implementation Guide*

  See Post-Accounting Programs, *Oracle Subledger Accounting Implementation Guide*

  See Transaction Account Builder Overview, *Oracle Subledger Accounting Implementation Guide*

- For SLA processing, navigate to the User Main menu

  (available on the View menu).

Allocating Costing Percentages at Assignment Level

Use the Assignment Costing window to specify a percentage allocation of costs for an employee assignment.

You allocate costing percentages from the Assignment Costing window in Oracle Self-Service HRMS.

To allocate costing percentages at assignment level:

1. View the people in your hierarchy and select the Action icon for the employee and assignment combination that you want to cost.

2. Choose the date on which you want your changes to take effect. Select either Changes should take effect on the effective date, or Changes should take effect as soon as final approval is made. Click Continue.

3. View the existing assignment costing information for the employee. You can amend the existing percentages or Add Another Row so that you can enter additional costing information.

   You can also remove an existing row by setting an end date for it, or purging the data. If you choose to purge the data, remember that records can have multiple start dates. Make sure that you select the earliest available start date for the record as your start date for the purge. Remember that if you remove a row, you must also adjust the percentage allocations in the remaining rows so that they still total 100.

   You can also update or correct a record. If you make a correction, your effective date for the correction must be the start date of the record. However, this effective date can correspond to any of the multiple start dates that exist for this record.

   You can search for existing cost code combinations based on Fund, Organization, Object, Activity. Alternatively, click Create to create a new cost code combination.

4. When you have completed your changes, click Next to move to the Summary window. Click Submit to save your changes.

Previewing Cost Allocations

When you are making a series of cost allocations in preparation for running the Costing process, you can preview the overall effect of your changes before you run the Costing process. You can also see a graphical display of the costing allocations. The preview helps you to:

- See how separate costing entries at different levels combine to give a consolidated costing allocation.
- Detect potential errors, correct them at an early stage, and complete the Costing process quickly and efficiently when you do run it.

You preview the effect of your changes from the View Cost Allocations window.

To preview cost allocations and identify incorrect costings:

1. Select the assignment that you want to cost.
2. Choose the Others button.
3. Select View Cost Allocations

   You can now see each of the costed elements for the assignment and their derived values.
4. Choose the Validate button to display any costings that are invalid. If any costings are invalid, the entry in the Cost Allocations column is marked by an **X.**
5. If you want to see further details about any costing, choose the Details icon. This identifies the segment of the Cost Allocation field on which the error occurred.
6. Correct the invalid entry by navigating to the form containing the invalid segment. Then, preview cost allocations again to confirm that all cost allocations are now valid.

To display a graphical analysis of cost allocations:

1. Select the assignment that you want to cost.
2. Choose the Others button.
3. Select View Cost Allocations.
4. Choose the Graphical Analysis tab.
5. Select the segment that you want to view.
6. Choose the Go button to see a pie chart display of the cost allocations for the segment.

Running the Costing Process

The Costing process generates journal entries for your ledgers and costing information relating to labor costs. You can enter start and end dates of the period over which you

want to cost payroll runs in order to cost all your runs in one process. Alternatively, you may want to produce a costing run for each payroll run

The Costing process includes all employees with active assignments on the payroll that you specify. This means that you can get accurate costings for those employees who have moved to a different payroll by the time you run the Costing process.

You run the Costing process from the Submit Requests window. You should run Costing before the Transfer to GL process.

To run the Costing process:

1. In the Name field, select Costing.
2. In the Parameters window, select the name of the payroll or consolidation set to run the process for. When you select a payroll, its default consolidation set displays.
3. Enter the start and end dates of the time span for the Costing process to cover.
4. Choose the Submit button.

Running the Costing Summary Report

Use the Costing Summary report to report the summary of:

- The results of Costing processes within a selected date range
- Results of a particular Costing process

This report displays the individual Costing Flex segments you defined. It breaks down the cost information based on the unit of measure, displays them for each code you defined, and also includes the partial period accruals.

To run the Costing Summary Report:

1. In the Name field, select "Costing Summary Report".
2. Select the Parameters field to open the Parameters window.
3. Specify the begin and end dates for this costing period.

   Alternately, you can select a Costing Process you have run previously.
4. Specify the name of the payroll for which the costing summary is required.
5. Select a consolidation set.
6. **(US and Canada only)** Select a GRE.

7. In the Include Accruals field, specify the Partial Period Accrual Type you want included in the report spreadsheet.

8. **(US and Canada only)** Indicate either GRE or Payroll Name as the primary sort criteria for this report.

   The parameter you do not choose automatically becomes the secondary sort criteria.

9. Specify an file format for this report's output file. You can choose between CSV or HTML formats.

10. If you want to produce this report in Portable Document Format, (PDF), select a template.

11. Choose OK and then Submit.

Running the Cost Breakdown Report

There are two versions of the Cost Breakdown report:

- The Cost Breakdown Report for Costing Run shows summarized costing totals for a specified costing process.

- The Cost Breakdown Report for Date Range shows summarized costing totals for a particular consolidation set or payroll over a specified interval.

Both versions show the distribution of payroll calculation results plus corresponding General Ledger and labor cost details.

You run both versions in the Submit Requests window.

To run the report for a Costing Run:

1. In the Name field, select the report name. Then enter the Parameters field to open the Parameters window.

2. Enter the costing process for which you want to generate the report.

3. Choose whether you want to include partial period accruals on your report, by making one of the following selections in the Include Estimate Costing field:

   - Accruals - to display accrued amounts.

   - Accruals and Reversals - to displays accrued amounts and reversals.

   - Neither - to display neither accruals nor reversals.

4. If you want to produce this report in Portable Document Format, (PDF), select a

template.

5. Choose OK

6. Choose the Submit button.

To run the report for a Date Range:

1. In the Name field, select the report name. Then enter the Parameters field to open the Parameters window.

2. Enter the start and end dates for which you want to generate the report.

3. Select the name of either the payroll or the consolidation set for which you want to see information. Additionally, if your legislation allows costing by reporting entities, you can specify whether this costing run should apply to all reporting entities, or to a single reporting entity that you select in the reporting entity field.

4. Choose whether you want to include partial period accruals on your report, by making one of the following selections in the Include Estimate Costing field:

   - Accruals - to display accrued amounts.
   - Accruals and Reversals - to displays accrued amounts and reversals.
   - Neither - to display neither accruals nor reversals.

5. If you want to produce this report in Portable Document Format, (PDF), select a template.

6. Choose OK

7. Choose the Submit button

Running the Costing Detail Report

The Costing Detail report provides pertinent costing allocation details at the element and employee level. This report is capable of providing a complete representation of the entries transferred to Oracle General Ledger; you can collapse this data to look at the total credit and debit values at the GRE or Payroll level.

You run this report from the Submit Processes and Reports window.

To run the Costing Detail report:

1. Select Costing Detail report in the Name field.

2. If the parameters window does not open automatically, click in the Parameters field to open it.

3. Select the Parameters for the report. See the Costing Detail Report Parameters section below for more information.

4. Select OK and Submit.

Costing Detail Report Parameters

The following parameters exist for the Costing Detail Report:

Costing Effective Date Begin (required)	Enter the start date for the report. Any records processed by costing on or after this date can be picked up for the report.
Costing Effective Date End (required)	Enter an end date for the report. Any records processed by costing after this date will not be picked up by the report.
Selection Criterion	Use this field to restrict the output of the Costing Detail report. Select either Element Classification, Element Name, or Element Set. The corresponding field in the Parameters window becomes mandatory. If you leave this field blank, the report includes costing information on all three parameters for all elements.
Element Set	If this is the Selection Criterion for the report, select one element set. If you make a selection in this field, the report only includes costing information for the element set you select.
Element Classification	If this is the Selection Criterion for the report, select one element classification. If you make a selection in this field, the report only includes costing information for the element classification you select.
Element	If this is the Selection Criterion for the report, select one element. If you make a selection in this field, the report only includes costing information for the element you select.

Payroll	Select a Payroll. If you make a selection in this field, the report only includes costing information for the payroll you select; otherwise, all payrolls are included in the report.
Consolidation Set	Select a consolidation set. If you make a selection in this field, the report only includes costing information for the consolidation set you select; otherwise, all consolidation sets are included in the report.
Government Reporting Entity	Select a GRE. If you make a selection in this field, the report only includes costing information for the GRE you select; otherwise, all GREs are included in the report.
Organization	Select an organization. If you make a selection in this field, the report will only include costing information for the Organization you select, otherwise all Organizations are included in the report.
Location	Select a location. If you make a selection in this field, the report only includes costing information for the Location you select; otherwise, all Locations are included in the report.
Employee	Select an employee. If you make a selection in this field, the report only includes costing information for the employee you select; otherwise, all employees are included in the report.
Assignment Set	Select an assignment set. If you make a selection in this field, the report only includes costing information for the assignment set you select; otherwise, all employees are included in the report.

Output File Type (required)	Select either HTML or Comma Delimited format. If you select HTML, the output file is displayed in a web browser when opened from the View Requests window. If you select Comma Delimited, the output file is in .CSV format and can be saved and viewed in a third party application.

Mapping Cost Allocation to the Accounting Flexfield

If your installation includes Oracle Payroll and Oracle General Ledger, you can run the Transfer to GL process in each payroll period after you have run the Costing process. The Transfer to GL process transfers costing results to the GL Accounting flexfield. Before running this process, you must map segments of the Cost Allocation flexfield to the corresponding segment of the Accounting flexfield for each payroll. To do this, use the GL Map window.

To map Cost Allocation to Accounting flexfield segments:

1. Set your effective date to the date from which this mapping should take effect.
2. Query the payroll for which you are performing the mapping. Its period type appears in the Period field.
3. Select the ledger for whose Accounting flexfield you are performing the mapping. Costing information from a payroll can go to only one ledger.
4. Select the name of a Cost Allocation flexfield segment in the Payroll Costing Segment field for which a corresponding segment exists in the Accounting flexfield. Select the name of the corresponding segment in the GL Chart of Accounts Segment field. Repeat this process for all the Cost Allocation flexfield segments for which there is a corresponding segment in the Accounting flexfield.
5. Save your entries.

Running the Partial Period Accrual Calculation Process

If the end of your accounting period occurs before the end of your current payroll period, you may have outstanding costs that have accrued since the end of your last complete payroll period. You can incorporate these accrued costs in your end of period accounting by:

- Posting estimated costs for the accrued period

- Reversing these estimated costs when the actual costs become available

You do this by:

- Running the Partial Period Accrual process on the last day of the accounting period
- Running the Transfer to GL process, also on the last day of the accounting period.
- Running the Transfer to GL process again when the actual costs become available at the end of the current payroll period. This cancels your estimates and replaces them with the actual costs.

To run the Partial Period Accrual Calculation Process:

1. Enter the name of the payroll for which you want to calculate partial period accruals.
2. Enter the consolidation set name.
3. Enter the period date.

   The period date specifies the payroll period that you want to use as a basis for the accruals. The process bases its estimates on runs whose effective date (check date) lies in the payroll period containing the period date you specify here. If you offset your check date (say, a week after the period end date), offset the period date as well. Specify a period date within the pay period containing the check date.
4. Confirm that the accounting date is correct.

   This is the effective date (the date on which you will post your estimates to the general ledger), typically the last date of the accounting period.
5. Choose OK.
6. Choose Submit

   You have now calculated the estimated costs, and you can transfer them to General Ledger. You have also automatically stored a negation of these estimates and this is used to cancel the estimates and replace them with the actuals when you next run the Transfer to GL process.

   See Running the Transfer to GL Process, page 4-78

Running the Transfer to GL Process

If your installation includes Oracle General Ledger, you can run the Transfer to GL process. This transfers the results of the Costing process for a payroll to the Accounting flexfield of Oracle General Ledger.

It is not necessary for your payroll to use the same currency as your general ledger.

The Transfer to GL process includes all employees with active assignments on the payroll that you specify. This means that you can get an accurate transfer of costs for those employees who have moved to a different payroll by the time you run the Transfer to GL process.

You run the Transfer to GL process from the Submit Requests window.

To run the Transfer to GL process:

1. In the Name field, select Transfer to GL.
2. In the Parameters window, select the payroll or consolidation set for which you are running the process. When you select a payroll, its default consolidation set displays.
3. If you want to set the accounting date for the transfer to date earned, then change the TGL_DATE_USED pay action parameter to "E". If you do not do this then the accounting date of the transfer defaults to the check/cheque date of the originating payroll
4. Enter the start and end dates of the period for which you want to transfer Costing process results.
5. Choose the Submit button.

Running the Upgrade Historical Payroll Data to SLA Process

Run this process to migrate any historical costing data to Sub Ledger Accounting (SLA). The application migrates the payroll data from General Ledger (GL) to SLA for all the closed or non adjustable periods of the selected ledger.

> **Note:** You run this process to migrate payroll costing details that have been posted already to General Ledger prior to R12's Sub-Ledger Accounting.

Oracle recommends you to run the concurrent program in a logical sequence for easy reconciliation. For example, upload GL data of 2006 periods to payroll after 2005.

You run this process in the Submit Requests window.

To run the Upgrade Historical Payroll Data to SLA Process:

1. In the Name field, select Upgrade Historical Payroll Data to SLA.
2. Select the Parameters field to open the Parameters window.

3. In the Parameters window, select Ledger to indicate the ledger to use to migrate the costing data.

4. Enter the start date and end date for which you want to migrate the historical payroll data.

5. Click OK and then Submit

Running the Transfer to SLA Process

If you use Subledger Accounting, use the Transfer to SLA process to pass your payroll costs to General Ledger. The Transfer to SLA process creates an SLA accounting event for each of your payroll assignment actions. The Subledger Accounting application then notifies you when it has intercepted your accounting events. The notification indicates that you can use the Subledger Accounting application to process your costs and report on them.

Note that you cannot roll back transfers to SLA once SLA has finalized the journal entries.

You run the Transfer to SLA process from the Submit Requests window.

To run the Transfer to SLA process:

1. Select your payroll.

2. Select a consolidation set.

3. Select the start date.

4. Select the end date.

5. Choose the Submit button

Running the Costing of Payment Process

Use the Costing of Payment process to provide automatic accounting entries that reduce your dependence on manual journal entries. By default, the Costing of Payment process always costs all payments regardless of whether they are cleared or uncleared. However, the process parameters enable you to override the default so that you can also cost:

- Uncleared payments only

- Cleared payments only

You have the flexibility to schedule your costing of payments as follows:

- Several separate operations: You cost uncleared payments during the payroll cycle and then cost cleared payments separately during the reconciliation cycle.

- A single operation: You wait until the reconciliation cycle has completed and then cost cleared and uncleared payments in one consolidated operation.

You run the Costing of Payment process from the Submit Requests window.

To run the Costing of Payment process:

1. If you want to cost payments for a single payroll, select the payroll name.

2. If you want to cost payments for a consolidation set, select the consolidation set name.

   You must choose either a payroll or a consolidation set.

3. Enter the start date and end date to specify the period for which you want to cost payments.

4. Select a payment type. Your selection determines what type of payments get costed when you run the Costing of Payments process.

   - Uncleared payments: Select to cost uncleared payments within the payroll cycle

   - Cleared payments: Select to cost cleared payments within the reconciliation cycle

   - Uncleared and cleared payments: Select to cost uncleared and cleared payments within the reconciliation cycle

5. Click OK to confirm that your parameters are correct.

6. Click Submit to run the Costing of Payment process.

   When the Costing of Payment process has completed, you can see the results either in the Payroll Process Results window or in the Assignment Process Results window. In either case, results appear as follows:

   - The Costing Breakdown window shows the overall number of costed payments for a payroll and indicates whether the status is complete or pending.

   - The Costing window shows the individual costed values for a payment method.

Running the Costing of Payment Summary Report

Run the Costing of Payment Summary report to display the summary of costing data at

the selected payroll or GRE level within a selected date range

You can sort summary data either by Payroll or GRE name. The report also display sum of credit and debit values of all payrolls or GREs.

You run the Costing of Payment Summary Report from the Submit Requests window.

To run the Costing of Payment Summary Report:

1. In the Name field, select Costing of Payment Summary Report.
2. If the parameters window does not open automatically, select the Parameters field to open the Parameters window.
3. Enter the begin and end dates for the costing period.
4. You must select the costing process that you have run previously.

   Note: You can either specify the dates or select the costing process but not both.

5. Specify the name of the payroll for which the costing summary is required, otherwise, all payrolls are included in the report.
6. Select a consolidation set to restrict the report otherwise, all consolidation sets are included in the report.
7. Select a GRE, if applicable.
8. Indicate either GRE or Payroll Name as the primary sort criteria for this report. The parameter you do not choose automatically becomes the secondary sort criteria.
9. Specify a file format for this report's output file. You can choose between CSV or HTML formats. If you select HTML, the output file is displayed in a web browser when opened from the View Requests window. If you select Comma Delimited, the output file is in .CSV format and can be saved and viewed in a third party application.
10. Click OK and then click Submit.

Running the Costing of Payment Breakdown Report

You run the Costing of Payment Breakdown Report to view the costing results consolidated at ledger and account type level. This report displays the costed value for each cost segments for ledger or account type combination. You can view data by currency code and the complete costing of payment values

You run the report in the Submit Requests window.

To run the Costing of Payment Breakdown Report :

1. In the Name field, select the report name.
2. If the parameters window does not open automatically, select the Parameters field to open the Parameters window.
3. Specify the start and end dates for the costing period. Any records processed by costing before or after this date will not be picked up for the report.
4. Enter the costing process for which you want to generate the report.

   Note: You can either specify the dates or select the costing process but not both.

5. Specify the name of the payroll for which the breakdown of costing information is required, otherwise, all payrolls are included in the report.
6. Select a consolidation set to restrict the information within the report, otherwise, all consolidation sets are included in the report.
7. Select a payment method to report the costing information. When you select the payment method, the payment type ID automatically displays for the selected payment method.
8. Specify a file format for this report's output file. You can choose between CSV or HTML formats. If you select HTML, the output file is displayed in a web browser when opened from the View Requests window. If you select Comma Delimited, the output file is in .CSV format and can be saved and viewed in a third party application.
9. Click OK and then click Submit.

Running the Costing of Payment Detail Report

You run the Costing of Payment Detail report to validate costing of payment results at an assignment or payment level.

You run this report from the Submit Requests window.

To run the Costing of Payment Detail report:

1. Select Costing of Payment Detail report in the Name field.

2. If the parameters window does not open automatically, click in the Parameters field to open it.

3. Enter the start date for the report. Any records processed by costing on or after this date can be picked up for the report.

4. Enter an end date for the report. Any records processed by costing after this date will not be picked up by the report.

5. Select a payroll to restrict the costing information for this payroll only, otherwise, all payrolls are included in the report.

6. Select a consolidation set to report the costing information for the consolidation set you select; otherwise, all consolidation sets are included in the report.

7. Select a payment method to report the costing information.

8. When you select the payment method, the payment type ID automatically displays for the selected payment method.

9. Select an employee to the report only costing information for the employee you select; otherwise, all employees are included in the report.

10. Select an assignment set to the report only costing information for the assignment set you select; otherwise, all assignments sets are included in the report.

11. Select either HTML or Comma Delimited format. If you select HTML, the output file is displayed in a web browser when opened from the View Requests window. If you select Comma Delimited, the output file is in .CSV format and can be saved and viewed in a third party application.

12. Click OK and Submit.

RetroCosting

RetroCosting

The RetroCosting process ensures that the costing information entered for payroll processing is correct. It does this by recalculating all costing records using current costing information and then comparing these results with the existing costing information. This identifies any discrepancies between current costing information and existing costing records. Such discrepancies may arise when:

- The definition of the Costing key flexfield segments has been changed at any level, for example payroll, organization, assignment, element link or element entry.
- The following changes have been made at element link level:
  - Correction of the costable type of a link from Costed to Not Costed, or from Not Costed to Costed.
  - Corrections to the values of costed links, such as Costed, Fixed Costed and Distributed.
  - Corrections of balancing account codes.
  - Corrections of distribution sets for element links marked as distributed.
- The codes of distribution set member elements have been changed
- Costing records do not exist because the costing process did not run successfully.

Running the RetroCosting Process

You can use the RetroCosting process to make retrospective costing corrections. This applies where the correct costing amounts have been entered but assigned to the wrong costing code. The need for RetroCosting arises if the original costing code has been incorrectly entered, or if there has been a late change to the costing code. In each instance RetroCosting enables you reassign costs to the correct costing code.

The RetroCosting process does not involve any change to the way in which you transfer costs to GL. After you have applied the RetroCosting process you can transfer costs to GL as you would for non-retroactive costs.

To run the RetroCosting process:

1. Enter retroactive costing changes using DateTrack.

2. If the process is to run for several assignments, create the assignment set.

3. Navigate to the Submit Processes and Reports window and select RetroCosting. Enter the following as process parameters:

   - Payroll Name (optional)
   - Consolidation Set (mandatory)
   - Start Date (mandatory). This is start of the period over which the RetroCosting is to be applied.
   - End Date (mandatory). This is the date on which the retroactive costing data takes effect. The process will include all historic costing from the start date through to the end date.
   - Assignment Set (optional)

4. View Process Results

   There is an assignment action with the type RetroCosting for each assignment in which there has been a change of costing information.

   You can view the retroactive costing records from the Payroll Process Results window:

   - Select the RetroCosting action for the assignment and period.
   - Click on Costing

   You can also see RetroCosting process results on the Costing Breakdown Summary Report

Workforce Intelligence Key Concepts for People Budgets and Costing

Key Concepts for People Budgets and Costing Intelligence

The following concepts enable you to accurately interpret the results of the People Budgets and Costing intelligence reports:

- Workforce Count, page 4-87
- Control Budgets, page 4-87

Workforce Count

One of the most powerful features of the People Budgets and Costing reports is that you can define how the reports count workforce.

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, or a budget measurement unit you have set up. For example, you can count workforce using the budget measurement units 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*

Control Budgets

HRMSi provides budget trend and budget status reports for control budgets. You can review differences between your budgeted workforce and the actual number of employees for specific budgets, organizations, jobs, grades, or positions.

See: Position Control, *Oracle HRMS Enterprise and Workforce Management Guide*

See: People Budgets and Costing Overview, page 4-1

5

Person Types and Employment Groups

People Types and Employment Groups Overview

As an agency, you define different groups of people to:

- Store information about different groups of people.
- Control access to records of different groups of people.
- Report and enquire on different groups of people.
- Grant eligibility to certain benefits

Managing People Types and Employment Groups Using Oracle HRMS

Oracle HRMS provides you with the following ways to group people in your enterprise:

- **Work Structures**

  The structures in which a person works provide you with ways of defining groups of people in your enterprise. For example, groups working at a particular location, or on a certain grade (for employees only), or in a department. You create different groups by assigning people to the work structures in their assignment.

- **Person Types**

  Person types enable you to group people together based on the role they perform in your enterprise. Use person types to recognize different groups of people for reporting purposes, and to control access to information.

- **People Group Key Flexfield**

  The People Group key flexfield enables you to create a structure to hold information that you use to identify different groups of people in your enterprise.

Managing People Types and Employment Groups Using Oracle Self-Service Human Resources (SSHR)

Oracle Self-Service Human Resources (SSHR) enables different groups of people to access HR information through personalized interfaces for their roles, and information needs. Using SSHR, you can configure HR business processes for different user groups based on their specific requirements. You can hide or show different regions of the application and fields of a transaction based on the category of user. For example, you can grant access for all employees to maintain their own benefit options and personal information.

Oracle Self-Service Human Resources (SSHR) is a separately licensed product. Contact your Oracle sales representative for more information on licenses.

Reporting on People Types and Employment Groups

Oracle HRMS and Oracle HR Intelligence (HRMSi) enable you to produce a range of reports that you can run for different groups of people.

For example, Oracle HRMS enables you to run the Headcount Detail report for different groups of people to investigate the number of people in a selected organization.

Key Concepts

To get the most of your people types and employment groups functionality, you need to understand the following concepts:

- Person Types, page 5-4
- Employee Groups, page 5-7

People Types and Employment Groups

Oracle HRMS enables you to represent and organize your workforce to meet the requirements of your enterprise.

How can I represent different groups of people in my enterprise?

Oracle HRMS provides you with the following ways to group people in your enterprise:

- Work Structures: you can define groups based on the structure in which people work in your enterprise.
- Person Types: You can define different groups of people based on the role they perform in your enterprise. Oracle HRMS provides you with a number of

predefined person types such as, employees, applicants, and contingent workers. If you want to identify different types of employee, for example to identify employees who are on a student placement, then you can define a subgroup of the employee person type called Student Placement.

- People Group Flexfield: You can use this flexfield to hold information for different groups of people in your enterprise.

Can I record details of additional roles the people in my enterprise perform?

Yes. Oracle HRMS enables you to record details of additional roles a person has in your enterprise. As a result of performing an additional role, the person can be a member of a representative body, typically a committee or organization with joint employer and employee representation.

People and Person Types

Person Types

In any enterprise there is a need to identify different groups of people. For each group that exists in your enterprise there may be different types of information you need to keep. You may also want to control access to the records of different groups of people.

There are three basic types of people for whom you maintain information in your human resource system. These are:

- Employees, both current and ex-employees
- Applicants, both current and ex-applicants
- Contingent workers, both current and ex-contingent workers
- External people

A special category of the External type is *contact*. A contact is someone associated with an employee or an applicant.

Contacts can include the following types of people: people who are dependents of employees, people whom employees name as beneficiaries of certain benefits, and people whom employees list as their contacts in case of emergency.

System and User Person Types

Oracle HRMS comes with a set of person types recognized by the application, and identified by a system name. For each, there is a predefined user name. You can change the predefined name and you can enter other user names.

User Name	System Name	Default
Employee	Employee	Yes
Applicant	Applicant	Yes
Contingent Worker	Contingent Worker	Yes
Ex-employee	Ex-employee	Yes
Ex-applicant	Ex-applicant	Yes

User Name	System Name	Default
Ex-contingent Worker	Ex-contingent Worker	Yes
Contact	External	Yes
External	External	No

Each person type has a predefined user name that you can change when you install the system. To more accurately represent the people of your enterprise, you can then extend this further by adding subgroups to each system person type. For example, Oracle HRMS is installed with the system person type of employee, you might have two types of employee in your enterprise:

- Regular Employee
- Invalid Employee

You can define these as subgroups of the Employee person type to:

- Enable fast identification of these groups
- Manage different kinds of personal information for each group

> **Note:** Each employee's assignment can be described by an *assignment category* such as Full Time - Regular or Part Time - Temporary. So you do not use person types to distinguish the category of assignment.

In another example, you might want to distinguish between internal and external applicants for vacancies. You may also be involved in a redundancy program or a program of staff layoffs, and need to identify employees as preferred candidates for any vacancies. You can do this with the following subgroups of applicant:

- Internal Candidate
- ExternalCandidate
- Preferred

When you create people in Oracle HRMS, you assign them a person type to represent them in your enterprise. The user person type you select for them is known as their person type usage.

In these examples you are able to extend system person types by defining your own user person types to accurately represent the people of your enterprise.

If subsequently you apply further person types to a person, for example, if you hire an

employee, then the person types are concatenated, for example, *Employee.Ex-Applicant.*

> **Note:** A person cannot be an employee and a contingent worker at the same time.

OAB Person Types

In addition to system and user person types there are also OAB person types. These are predefined in Oracle HRMS and automatically created when certain actions occur in Standard or Advanced benefits. For example, when an employee dies, a user type of surviving family member could be created or when the leaving reason of retiree is entered for an employee, the user person type of retiree is created.

The eight predefined person types are are shown in the table below.

OAB person types table:

User Name	System Name
Retiree	Retiree
Former Spouse	Former Spouse
Surviving Family Member	Surviving Family Member
Surviving Spouse	Surviving Spouse
Former Family Member	Former Family Member
Beneficiary	Beneficiary
Dependent	Dependent
Participant	Participant
Surviving Domestic Partner	Surviving Domestic Partner
Surviving Domestic Partner Family Member	Surviving Domestic Partner Family Member

Although these are usually created automatically as part of your benefits administration, you can add and delete these person types manually using the Person Type Usage window. This enables you to correct any special circumstances and also assign people to OAB person types for which they would otherwise not be eligible.

Note: You can not add or amend the person type of Retiree as this is maintained by the application.

You can also change the user name of any person type usage to another user name defined for the same system person type in this window.

OAB system person types co-exist with the HR system person types. This means that a person can be recorded as an Applicant for HR purposes and a Beneficiary for OAB purposes simultaneously.

Person Types and Information Management

You can use person types to control the type of information you can enter. For example, you cannot enter earnings or deductions for an applicant. You can use person types in the following ways:

- To control access to people's records on the application. For example, you may give all managers in a department access to employee records, but only give recruitment officers access to records of applicants and ex-employees.

  Your system administrator can achieve this by creating customized versions of the People window.

  See: CustomForm, *Configuring, Reporting, and System Administration Guide*

- When you set up your own fields to hold additional information, you can tie them to particular person types. For example, you may want a user-defined field holding visa information for foreign workers to appear for employees and applicants, but not for other people.

  You can do this by setting up the descriptive flexfield on the People window.

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

  Note: If you want to define rules of eligibility for a compensation or benefits element based on the type of employee, you cannot use the person type directly. However, you can use person type in a *formula* to validatethe values entered for an employee.

  Also, consider whether you can meet your needs using the assignment status and employment category to control eligibility for compensation and benefits.

Other Employee Groups

Oracle HRMS provides a special structure you can use to define any other special

groupings of employees your enterprise requires. This structure is called the people group. Just as with payrolls and other work structures, you can assign employees to people groups, and use them to define employee eligibility for compensation and benefits elements.

Using the People Group key flexfield to define your groups is a powerful mechanism because you can:

- Link elements to Group flexfield segments so that only employees within the group are eligible for the elements
- Inquire and report on individual segments in Inquiry windows and in reports
- Use DateTrack to build up a history of the group information

Once you decide how to define the Group key flexfield structure and segments, it is the responsibility of the system administrator to set the flexfield up. At least one segment of this flexfield must be set up before you can begin entering employee assignments.

If you make any of the People Group segments required, this will apply to both the Element Link window and the Assignment window. This means that you may have to create multiple element links if you want to use a People Group segment in the eligibility criteria for a link.

For example, suppose you have defined two segments: a Yes/No segment called Fast Track, which is required, and a segment called Pension Plan, which is not required. You want to make an element available only to members of a certain pension plan. However, you must create two element links: one for members of the pension plan who are on the Fast Track, and another for members who are not on the Fast Track.

> **Important:** If there are many possible values for the required segment, the maintenance of multiple links can become a burden so be cautious in making segments of this flexfield required.

Defining Person Types

You can define your own names to identify the 'types' of people in your system. These include all types of employees, applicants, contingent workers, and contacts, as well as current and 'ex-' types.

Three Person Types (employee, ex-employee, and applicant) are used by the Request for Personnel Action (RPA) process. For example, using an RPA you appoint an applicant, promote an employee, and separate an employee. You can use the other system Person Types for non-RPA purposes such as maintaining ex-applicant information. Similarly, if you wanted to maintain information about volunteers, you might want to use Person Type to identify volunteers.

One user name must be the default. This is the name the system enters in certain

circumstances if you do not select a Person Type manually. For example, when you hire an applicant using an RPA, the system automatically updates the Person Type to the default user name for the system name 'Employee'.

You enter user names for person types in the Person Types window.

To change a user name for a person type:

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

To map other user names to a person-type system name:

1. Insert a new record.

2. Enter a unique User Name and select the System Name that you want to map.

Deactivating User Names

You cannot delete user names in use in the system, but you can deactivate them by unchecking the Active check box. Deactivating a person type prevents you from selecting it in the People window. Notice that you cannot deactivate a default User Name. You must first select another user name as the default.

> **Note:** Do not deactivate the predefined user names. The product requires these user names to process Requests for Personnel Actions.

Changing Person Type Usage and Deleting OAB Person Type Usage

Use the Person Type Usage window to manually change person type usage. You do this when you want to change someone's person type to another user person type for the same system person type.

For example, you may have two user person types for the system person type of employee. These could be Student Placement, and Permanent Employee. If you wanted to change one of your employees from a Student Placement to a Permanent Employee, you would use this window. This change is datetracked for HR person types.

See: Person Types, *Oracle HRMS Enterprise and Workforce Management Guide*

The user person types shown on the Person Type Usage window are displayed in the Type field on the People window. OAB person types are usually automatically linked to a person when an event occurs in benefits administration, however there may be special occasions where you would want to amend them manually.

To change a person type usage:

1. Select the new user person type and choose Correction or Update in the displayed

dialogue box. For an OAB person type you have the Correction option only.

2. Save you work.

To delete an OAB person type usage:

1. Set the effective date to the date on which you want the usage to end.
2. Select the user person type you want to delete and select Delete.

   Note: You can delete all records that use OAB person types except for those that use the person type Retiree, as this can only be maintained by the system.

3. Choose the End date or Purge button and save your work.

   If the amendments you have made mean that changes must be made to any benefit assignments, you must make these manually.

Entering OAB Person Type Usage

Use the Person Type Usage window to manually assign a person an OAB user person type that was not automatically created.

The OAB user person types shown on the Person Type Usage window are in addition to the type selected in the Type field on the People window. Apart from employee and applicant, they are usually automatically linked to a person when an event occurs in benefits administration, however there may be special occasions where you would want to assign a person type to a person manually.

To enter OAB person types:

1. Set the effective date to the date on which the person type usage must begin.
2. Query the person to whom you are assigning a person type.
3. Insert a new record in the Person Type Usage window.
4. Select the OAB user person type you want to associate with this person.

   Note: You can only have one active instance of any OAB system person type existing for a person at any one time. That means that if you already have a record of an OAB system person type, you cannot add another record for the same OAB system person type until after the end date of the existing record.

5. Save your work. If the amendments you have made mean that changes must be made to a person's benefits assignments, you must make these manually.

Workers' Representation and Supplementary Roles

Workers' Representation and Supplementary Roles

Oracle HRMS enables you to record information about constituencies, representative bodies, supplementary roles and elections. Within your enterprise you can perform a number of different roles. These roles range from company defined initiatives such as Fire Warden to legislative defined roles awarded as a result of an election.

Constituency

Constituencies are made up of components, such as, organization, location, and grade. You select components to define which people are part of the constituency. For example, if you include a grade in the constituency, all the people of that grade are included in the constituency. The people within the constituency are those eligible to vote in an election.

You can select the components to include in the constituency by using existing organization hierarchies. You use the Organization window to define the components of the constituency.

Representative Body

As a result of performing a role, an employee can be a member of a representative body. Representative bodies are typically committees or organizations with joint employer and employee representation.

Where these bodies are established by legislation, there are rules concerning the election process and you, or your enterprise, are responsible for recording the results of that election process.

The Organization window enables you to enter information about a representative body. By assigning constituencies to a representative body, you define which people make up that body.

Supplementary Roles

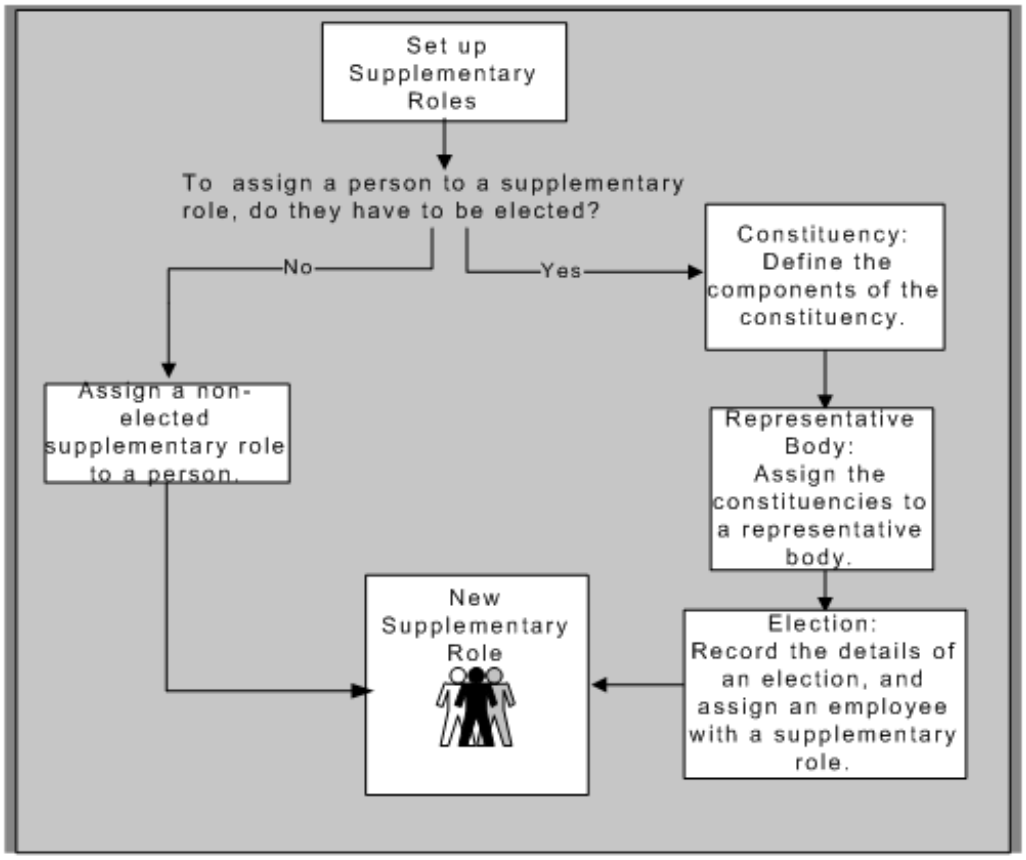
Supplementary roles are additional tasks that an employee performs in addition to being an employee. You can elect a person to a role, such as Union Representative, or a non-elected role, such as Fire Warden.

If a person needs to be elected to the role, you enter the election details and assign the person to the role using the elections window, but if they do not need to be elected, you can assign the person to the role through the Supplementary Roles window. You do not need to create any supplementary roles using the Job window before you can assign a person to that role.

Election

You can record election information, results and the role being undertaken by the person following an election, using the Elections window.

The following graphic illustrates the two processes of assigning supplementary roles:



Entering Supplementary Role Information

You can record information about any roles an employee or contingent worker holds which are not part of their contract; for example, Fire Warden or member of a workers' representative council.

You enter information about supplementary roles in the Supplementary Roles window.

To enter a supplementary role for an employee in Oracle HRMS:

1. In the Supplementary Roles window, select the Job Group to which the role belongs. You cannot select the default HR Job Group here. If you select a Job Group first, the list of roles is filtered to show only those roles attached to that Job Group.

2. Select the role (only roles attached to Job Groups other than the default HR Job Group are available for selection in this window). If you select a role first, the Job Group is automatically selected.

   You can save your work and close the window at this stage, or fill in the remaining optional fields in the window to record:

   - The representative body associated with the role, if applicable (you can only select representative bodies associated with the Job Group you have selected).

   - Whether the employee or contingent worker is a primary contact for the representative body.

   - The date on which the employee or contingent worker begins the role (this defaults to the effective date) and the end date.

   - The start date of any confidentiality agreement associated with the role.

   - Whether the role carries any additional rights, and if so, the date on which these rights will end.

     Note: The additional rights setting is defaulted from the value entered when you defined the role in the Job window. You can change this.

Entering Election Information

Use the Elections window to record information about an election, or to assign a candidate to a supplementary role.

To enter election details:

1. Select the name of the representative body.

   When you select the name of the representative body, the previous election date displays automatically if there has been a previous election.

2. Enter the date and description of the election.

3. Enter the previous election date if there has been a previous election, otherwise

leave the Previous Election Date field blank.

4. Enter the next election date if there is to be a future election, otherwise leave the Next Election Date field blank.

5. Enter the date the results are published in the Results Date field, otherwise you cannot enter a place attained by each candidate later.

Constituency Details:

1. Select the constituencies that are taking part in the election in the Constituency Details block.

Candidates and Election Results:

1. Select candidates for the election in the Candidates block.

2. Enter the place attained by each candidate in the Rank field.

3. Select a supplementary role for elected candidates if required.

   You can only select a supplementary role, that is part of the job group selected for the representative body, you are entering election results for.

4. Check the Primary Contact check box if the elected person is a primary contact for this representative body.

5. Enter a start date and end date for the supplementary role.

   If you enter a results date this defaults into the Start Date field. If you enter a next election date, this defaults into the End Date field.

6. Save your work.

   You can maintain supplementary role information in the Supplementary Role window. If you assign a supplementary role to a candidate and save it, you are only able to delete the supplementary role from the person's record in the Supplementary Roles window. You can then return to the Elections window and delete the candidate record, if required.

6

Employment Agreements and Legal Compliance

Employment Agreements and Legal Compliance

In your agency, you may have employment agreements that govern employment terms and conditions. These agreements may cover a few, many, or all of your workforce and the terms that they define could vary, depending on the particular situation of an employee. For example, the employment terms and conditions such as pay, work schedules, vacations, and deductions from wages may vary for an employee or groups of employees. The employer and the representatives of the employees, for example union representatives, negotiate the working terms and conditions specified in the employment agreement

Apart from adhering to the employment agreements, an agency has to submit several reports to government authorities to ensure legal compliance. For example, Oracle HRMS enables you to submit CPDF and EHRI reports, and record details of occupational health and safety measures.

Complaint Tracking

Complaint tracking is the process of recording information about a charge of discrimination brought against an agency by one or more people. Using complaint tracking, you can track a complaint from the first contact of a complainant through the final decision. You can maintain an accurate history of the complaint as it progresses, including information such as claims, bases, and incidents associated with a complaint, corrective actions, and costs related to the complaint.

You can also produce the annual EEO Form 462 report, a summary of the complaints processed that year, as a formatted PDF file.

See: Complaint Tracking Overview, page 6-20

Representing Employment Agreements Using Oracle HRMS

In Oracle HRMS, you represent an employment agreement as a *collective agreement*. Using Oracle HRMS, you can:

- Set up the collective agreement to contain the employment terms and conditions that apply to everyone covered by it
- Specify the values your workforce receives for performing specific roles or at specific locations
- Define the rules which ensure eligible workforce receive specific values such as one month of annual vacation that an employee completing minimum six months of employment in your enterprise receives
- Automatically assign values to your eligible workforce, when they are eligible for multiple values, by calculating the most beneficial value for them

For more information about representing employment agreements using Oracle HRMS, see: Collective Agreements, page 6-60

Recording Occupational Health and Safety Details Using Oracle HRMS

Using Oracle HRMS, you can:

- Record occupational health and safety measures such as medical assessments, disability information, and injuries at work (work incidents) for the people in your enterprise
- specify the disability concessions such as tax reduction and special consideration in work schedules such as part-time work
- record multiple medical assessments such as recruitment medical assessment or annual medical assessment

Oracle HRMS enables you to link this information together. For example, if a medical assessment is required as the result of a work accident, and that assessment then diagnoses a disability in the person, you can connect these records to one another.

Reporting for Legal Compliance

Oracle HRMS and Oracle HRMSi provide support for several countries to enable employers to fulfill their statutory reporting requirements. For example, you can submit the transmittal forms and files required by the Office of Personnel Management (OPM), including the Organizational Component Translation report, CPDF Status and Dynamics report, and the Standard Form 113-A Monthly Report of Federal Civilian Employment (SF113-A) report. You can also generate the required Enterprise Human

Resources Integration Reports (EHRI) Status and Dynamic reports.

See: CPDF and EHRI Reports, page 6-6, SF-113A, page 6-8

If your agency uses the National Finance Center (NFC) as a provider for government reports, you can submit the necessary position and personnel information to the NFC for their use in preparing these reports.

See: National Finance Center Interface, *Oracle HRMSConfiguring, Reporting, and System Administration Guide*

Key Concepts

To effectively use Oracle HRMS for employee agreements and legal compliance, see:

- Complaint Tracking, page 6-20
- CPDF and EHRI Reports, page 6-6
- Collective Agreements, page 6-60
- Value Sets for Collective Agreements, page 6-62
- Collective Agreements Administration, page 6-86
- Occupational Health, page 6-93

Employment Agreements and Legal Compliance

Oracle HRMS enables you to record employment agreements, track complaints, submit CPDF reports, and record details of occupational health and safety measures.

What CPDF data can I submit to OPM?

You can submit the transmittal forms and files required by the Office of Personnel Management (OPM), including the Organizational Component Translation report, CPDF Status and Dynamics report, and the SF113-A report.

What phases of the complaint process can I manage?

Complaint tracking is the process of recording information about a charge of discrimination brought against an agency by one or more people. Using complaint tracking, you can track a complaint from the first contact of a complainant through the final decision. You can maintain an accurate history of the complaint as it progresses, including information such as claims, bases, and incidents associated with a complaint, corrective actions, and costs related to the complaint.

Can I have selected employees covered by an employment agreement in my enterprise?

Oracle HRMS enables you to have some employees covered by an employment agreement and few others not covered by any employment agreement. For the employees covered by an employment agreement, you record the collective agreement details.

In an enterprise, can different employment agreements cover different employees?

Oracle HRMS provides the flexibility to maintain multiple employment agreements to cover different groups of people in an enterprise. For example, if you have officer workers and factory workers in your enterprise, you can maintain two different employment agreements to suit the groups.

How do I represent employment agreements in Oracle HRMS?

You represent an employment agreement in Oracle HRMS as a collective agreement. You represent the terms and conditions, as entitlement items that employees covered by the employment agreement will receive.

Can I specify which employees can receive specific terms of employment, for example the vehicle allowance?

You can define eligibility profiles (rules) that ensure that only employees who meet the eligibility rules receive the specific terms of employment, in this case the vehicle allowance.

Can an employee continue to receive a specific employment term after an event makes the employee ineligible for it?

Yes, an employee can still receive an employment term even if they are no longer eligible for them. For example, if by transferring from a location an employee becomes ineligible for a location allowance, you can define it as a retained right if you still want them to receive it. The employee will continue to receive the allowance for the period you define in this window.

What are the terms of employment that I can represent in a collective agreement?

Oracle HRMS enables you to represent the terms of employment based on your business requirements. Some of the terms of employment you can represent are pay, work schedules, vacations, termination notice, maternity leave, and deductions from wages.

Which occupational health and safety details can I maintain in Oracle HRMS?

You can record occupational health and safety details such as medical assessments of your employees, any injuries caused during work, and employee disabilities. You can also specify if the disability is the result of an injury at work.

What types of work injuries can I record?

Oracle HRMS enables you to record work injuries that occur at work, on the way to or from work, and in other circumstances that your enterprise defines as work-related.

Can I link the medical assessments, disability information, and work incident details?

You link these occupational health and safety details by relating one to the other. For example, if you do a medical assessment because of a work incident, which in turn results in a disability, then you mention them in the medical assessments, disability information and work incidents records.

Can I generate government-mandated reports covering disabilities, occupational health, and safety details?

Oracle HRMS enables you to generate government-mandated reports concerned with employment opportunities for people with various types of disabilities (Americans with Disabilities Act reports) and reports about the extent and severity of work-related injuries and illnesses affecting employees (Occupational Safety and Health Administration reports).

CPDF and Other Government Reporting

CPDF and EHRI Reports

The Office of Personnel Management (OPM) requires agencies to submit data about their employees to the Central Personnel Data Files (CPDF) and to the Enterprise Human Resources Integration Reports (EHRI) server.

After contacting OPM and coordinating the transmission of the CPDF and EHRI files, you can generate the required EHRI Status and Dynamics reports as well as the CPDF files and transmittal forms. These files include:

- CPDF Organizational Component Translation (OCT): A record of the organizational codes, titles, and hierarchical relationships for organizations within an agency as of the last day of the quarterly reporting period.

- CPDF Status Data: A record or snapshot of each employee's personnel data as of the ending date of a fiscal quarter. Status Data submissions include all active employees, both in a pay and non-pay status, on the agency rolls as of the end of the quarterly reporting period.

- CPDF Dynamics Data: A record of the personnel data changes that occurred for the employee during a reporting period.

  See: Creating CPDF Reports, page 6-9

  Note: If you process and update a dual action RPA, the CPDF Dynamics report treats the NOACs individually, listing each on a separate row.

- EHRI Status Data: A record of each employee's personnel data as of the ending date of a calendar month. Status data submissions consists of all active employees in a pay or non-pay status on the agency rolls as of the end of the pay period. The status data reflects the employee's position of record, the person's permanently assigned position. The monthly submission file includes Telework information.

- EHRI Dynamics Data: A list of all the employee personnel actions that you processed during a bi-weekly reporting period.

  The Cybersecurity Category or Specialty Area code is used to identify incumbents or positions for which the primary function is cyber security. The cybersecurity code is stored in the US Federal Position Group 1 Extra Position Information (EIT). To comply with OPM statutory requirements, the Enterprise Human Resources Integration (EHRI) Status and Dynamic reports include information on cybersecurity codes across occupational series for positions.

- EHRI Organizational Component Translation (OCT): A record of the organizational codes, titles, and hierarchical relationships for organizations within an agency.

See: Running the EHRI Status Report, page 6-12

See: Running the EHRI Dynamics Report, page 6-12

See: Running the EHRI Organizational Component Translation Report, page 6-13

CPDF Edits

The OPM has established sets of criteria against which it checks each of the file submissions. The application incorporates the CPDF edit checks and runs these checks when you process a Request for Personnel Action and when you update the human resource database.

If the OPM decides that a submission does not meet its quality standards, OPM notifies you of the errors and either recommends that you resubmit the files or that you wait and have the corrections reflected in the next report.

Appropriated and Non-appropriated Fund Positions

CPDF Status and Dynamic reports only include appropriated fund positions. When you create a new position, the application automatically enters APPR (Appropriated Fund Position) as the default Position Type in Position Group 2 Extra Information.

See: Defining a Position, page 3-26

Security

The EHRI and CPDF Status and Dynamic reports retrieve all the position and employee records for the business group associated with your login responsibility. If you have set up cross-business group functionality, the application runs the report for all business groups.

See: Setting up Standard HRMS Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Retirement Data Reporting

The Office of Personnel Management (OPM) requires agencies to submit retirement data about their employees to process retirements for Federal employees in a timely and accurate manner. OPM has detailed data reporting requirements for the Electronic Retirement Record (ERR) Data Feed. Oracle Federal HR provides the 'Retirement Data Report' to accomplish the reporting needs of the Guide to Human Resources Reporting (GHRR).

The Guide to Human Resources Reporting (GHRR) can be found using the following link: http://www.opm.gov/feddata/ghrr/index.asp

See: Setting Up Information for the Retirement Data Report, page 6-17

See: Running the Retirement Data Report, page 6-18

Organizational Component Translation Report

The Organizational Component Translation Report (OCT) shows the organizational management reporting structure. The system builds this report using the US Federal Org Reporting Info entered for the position's organization.

When you run the OCT report, you choose an agency code and a position hierarchy. The report function accesses the position detail and produces the report.

For example, if you create a position hierarchy where a clerk (agency code XX01) reports to an accountant in a different organization (agency code XX09), when you run the report for agency XX01, the clerk position isn't included, because it reports to a different agency. If you run the report for agency XX09, the clerk position is included, but the accountant position is not.

For each position in the position hierarchy, the report checks the US Federal Org Report Info for the position's organization. If you have completed the OPM Org Component information for the US Federal Org Report Info, the report prints the following information:

- Agency Code using the first two characters of the Position's Key Flexfield Agency Code/Subelement
- OPM Organizational Component using the Position Group 1 flexfield
- Organization Title using the Organization's Name field

  The report indents the Organization Title for each level of the hierarchy.

If you have not entered the US Federal Org Report Info information, the report prints no information for the position and skips to the next position.

Standard Form 113-A Monthly Report of Federal Civilian Employment

Federal agencies complete and submit to the Office of Personnel Management (OPM) monthly reports on federal civilian employees. The Monthly Report of Federal Civilian Employment SF 113-A covers statistical information on work schedule, types of appointments, positions occupied, wage system, citizenship, payroll, turnover, and Office of Management and Budget ceiling related data. This report also summarizes monthly data about federal civilian employment, payroll, and turnover.

To report on earnings information, your agency must create a reverse interface to Payroll. The product does not automatically derive that information for you.

SF 113-A

The body of the SF 113-A consists of a header, four main sections, and a signature line. Each line item value within each section is also detailed by geographic area. The sections include:

- Header: Details agency and reporting period information.
- Current Status: Reports the current employment for an agency or reporting group at the end of the month. It covers the Work Schedule, Type of Appointment, Position Occupied, Wage System, and Citizenship of Federal civilian employees.
- Payroll: Shows the monthly wages and salaries earned by Federal civilian employees during the reporting period, and lump sum amounts for annual leave paid to employees who have separated from the Federal Government during the reporting period. Employment totals relate to the report's "as of" date. The period for the preceding report starts the day after the "as of" date and ends the "as of" date of the current period. Payroll figures are reported in the *nearest whole thousands of dollars.*
- Turnover: Covers personnel actions that result in additions to (accessions) and losses from (separations) an agency's workforce. The turnover data only reflects accessions and separations having *effective dates* during the period covered.
- Data Excluding Special Employment Categories: Reports employment that excludes the former ceiling exempt employees. It is commonly referred to as Employment Ceiling Data.
- Signature Line: Details person, position, and date information of submission.

Security

Your login responsibility and its corresponding security profile determine which records you can view and process. When generating the required reports, make sure that you login using a view-all responsibility.

If you have set up cross-business group functionality, the application runs the report for all business groups; otherwise, it runs the report for your current login's business group.

Creating CPDF Reports

The Office of Personnel Management (OPM) requires agencies to submit data about their employees to the Central Personnel Data Files (CPDF). When the application counts records before generating CPDF reports, it acts only on Appropriated positions.

You generate a file and transmittal form for each of the required CPDF reports from the

Submit Processes and Reports window.

To run the OCT report:

1. In the Name field, select CPDF Organizational Component Tracking Rpt.
2. Enter the Parameters field to open the Parameters window. Enter the required parameters:
   - Report Date, the

     This date is the last day of a reporting period.
   - Agency name
   - Name of Position Hierarchy

     If you have created more than one position hierarchy, you also enter the Position Hierarchy/Version Number.
   - File Name you want to assign to the output file
3. Click the Submit button.

To run the OCT Transmittal Form:

1. In the Name field, select CPDF OCT Report Transmittal Form.
2. Enter the Parameters field to open the Parameters window. Enter the required parameters:
   - Report Date

     This is the same date that you entered for the OCT report; that is, the last day of the reporting period.
   - Agency Code
   - Subelement
   - Name of Position Hierarchy

     If you have created more than one position hierarchy, you also enter the Position Hierarchy/Version Number.
3. Click the Submit button.

To run the Status Data report:

1. In the Name field, select CPDF Status Report.

2. Enter the Parameters field to open the Parameters window. Enter the required parameters:
   - Report file name you want to assign to the output file
   - Report Date

     This is the last date of the reporting period.
   - Agency Code
   - Subelement
3. Click the Submit button.

To run the Status Data Transmittal Form:

1. In the Name field, select CPDF Status Report Transmittal Form.
2. Enter the Parameters field to open the Parameters window. Enter the Report Date you entered for the Status Data report.
3. Click the Submit button.

To run the Dynamics Data report:

1. In the Name field, select CPDF Dynamics Report.
2. Enter the Parameters field to open the Parameters window. Enter the required parameters:
   - Report Filename you want to assign to the output file
   - Report From and To dates
   - Agency Code
   - Subelement
3. Click the Submit button.

To run the Dynamics Data Transmittal Form:

1. In the Name field, select CPDF Dynamics Report Transmittal Form.
2. Enter the Parameters field to open the Parameters window. Enter the Report To and From dates for the reporting period month.

3. Click the Submit button.

Running the EHRI Status Report

The Enterprise Human Resources Integration Reports (EHRI) Status report is a record of each employee's personnel data for the calendar month. The monthly submission file includes Telework information. To comply with OPM statutory requirements, the Enterprise Human Resources Integration (EHRI) Status report includes information on cybersecurity codes across occupational series for positions.

You can generate the EHRI Status report as a flat file ASCII or XML format with the reported data separated by a pipe delimiter. You transmit the report using the ASCII output. When running the EHRI Status report, you enter the same report parameters as the CPDF Status report.

Use the Request Submit window to generate the report.

To run the EHRI Status report:

1. In the Name field, select EHRI Status Report.
2. Click the Parameters field to open the Parameters window.
   - Enter the report file name you want to assign to the output file.
   - Agency Code
   - Agency Sub-element
   - Report Date (the last date of the reporting period)
3. Click OK to accept the Parameters and close the window.
4. Click Submit to generate the report.
5. To locate the path of the ASCII and XML files, in the View Requests window, select the row for the report and click View Log.

The report generates an ASCII and an XML file. You can submit the resulting ASCII output to the OPM.

Running the EHRI Dynamics Report

The EHRI reports lists the employee personnel actions processed during a bi-weekly reporting period.. To comply with OPM statutory requirements, the Enterprise Human Resources Integration (EHRI) Dynamics report includes information on cybersecurity codes across occupational series for positions.

You can generate the EHRI Dynamic report as a flat file ASCII or XML format with the reported data separated by a pipe delimiter. You can transmit the report using the ASCII output.

Use the Request Submit window.

To run the EHRI Dynamics report:

1. In the Name field, select EHRI Dynamics Report.
2. Click the Parameters field to open the Parameters window. Enter the required parameters:
   - Report Filename you want to assign to the output file
   - Agency Code
   - Subelement
   - Report Start Date
   - Report End Date
3. Click OK to accept the Parameters and close the window.
4. Click Submit to generate the report.
5. To locate the path of the ASCII and XML files, in the View Requests window, select the row for the report and click View Log.

The report generates an ASCII and an XML file. You can submit the resulting ASCII output to the OPM.

Running the EHRI Organizational Component Translation Report

The EHRI Organizational Component Translation Report (OCT) shows the organizational management reporting structure for a specified agency on or before the reporting date. The application builds this report using the US Federal Org Reporting Info entered for an HR organization created using the HR Organization classification. For the report to provide data, the HR organization must be associated with at least one active federal position.

If you have not entered the US Federal Org Report Info information, the report prints no information for the organization and skips to the next organization. For more information on entering the US Federal Org Report Info, see: HR Organizations: Entering US Federal Reporting Information, page 2-52

To run the EHRI Organizational Component Translation Report:

1. In the Name field, select EHRI Organizational Component Translation Report.
2. Click the Parameters field to open the Parameters window.
3. Enter the required parameters:
   - Report date on which you want to run the report.
   - Report name you want to assign to the output file.
   - Agency Code using the first two characters of the Position's Key Flexfield Agency Code.
   - Subelement, which is the OPM assigned agency subelement.
   - Organization hierarchy for which you want to generate the report.
   - Organization hierarchy version number.
4. Click OK to accept the Parameters and close the window.
5. Click Submit to generate the report.

Report Output:

Submitting agencies are responsible for providing the report. Each EHRI Organizational Component Translation data file name conforms to the following naming convention:

OYYYYMMDDAAAA_V_R

Each portion of the file name is explained in the following table.

Name Segment	Description
O	Constant value of "O" indicating an Organizational Component Translation file.
YYYY	For file as of date, indicates century (20) and year (01-99).
MM	For file as of date, indicates month (01 to 12).
DD	For file as of date, indicates the day (01 to 31).

Name Segment	Description
AAAA	Indicates the agency or agency/subelement code for the submitting agency.
N	Resubmission indicator. One the first submission for each as of date, N is a numeric zero. If the data is resubmitted for the same as of date, the value of N is increased by 1.
V_R	Version (V) and Release (R) numbers for the file specification. This will allow the data warehouse load program to identify the file layout during transmission and load of the file. **Note:** The version and release numbers for this Guide is 1.1.

Creating SF 113-A Monthly Report of Federal Civilian Employment Reports

To report employment information to the Office of Personnel Management, you run the Federal Civilian Employment Report SF 113-A and transmittal forms as of the last calendar day of the month. You can submit the report as a Microsoft Excel spreadsheet. You can then mail or fax the report using the address at the bottom of the form.

Use the Submit Processes and Reports window.

To run the SF 113-A Report:

1. In the Name field, select SF-113A - Federal Civilian Employment Report.

   Note: To create Excel reports, your system administrator must specify the browser settings at the site level for the following system profiles: Viewer: Application XML, Viewer: Application Text, and Viewer: Text.

2. Click the Parameters field to open the Parameters window, enter the required information, and then click OK:
   - Agency code and Agency/Subelement
   - Employment as of Date: the last calendar day of the month.
   - Pay From Date and Pay To Date: the pay period dates

- Previous Report Date
- Report Date: the date that you want to have appear on the report.

3. Click Options in the Upon Completion region to display the format choices. In the GHSF113AOUT template row, select Excel from the Format list of values and click OK.
4. Click Submit to process the request.

   The application generates the data in an XML structure which it then merges with an RTF template to generate the output in a Microsoft Excel spreadsheet.

Completing the AA/EEO Breakdown Report

You can run the AA/EEO Breakdown report from the Submit Requests window or from the Breakdown folder. You use the Breakdown folder if you want to save your report criteria and customize the presentation of the data. The parameters you specify determine values such as the agency, organization, and pay plan that appear on the report.

Submit Requests

Use the Concurrent Manager Submit Requests window.

To run the AA/EEO Breakdown Report from the Submit Requests window:

1. Choose the agency on which you are reporting in the Agency Code field.
2. Choose the agency's subelement in the Agency/Subelement field.
3. Choose a category on which you want to report in the By Clause field, for example Appointment Type or Occupational Category Code.

   Note: The By Clause field is required.

4. Choose the Within Clause, either Pay Plan or Occupational Category Code (PATCOB).
5. Choose the organization type by which you want to view the report in the For Clause field.

   The For Clause controls the page breaks for your report.
6. Enter the date for which you want to see report values in the Effective Date field.
7. Choose an Organization Hierarchy.

See: Organization Hierarchies, page 2-85 , Creating Organization Hierarchies, page 2-89

8. Choose the Build Data button to run the report.

   The report results display in the Breakdown window.

Breakdown Folder

Use the Breakdown window.

To run the AA/EEO report from the Breakdown Folder:

1. Enter a Name for the report or query an existing report.

   For example, you might name a report EEO By Grade that summarizes complaints by Grade Level.

2. Follow steps 2 through 8 above to generate the report as you would from the Submit Requests window.

Setting Up Information for the Retirement Data Report

Before you generate the Retirement Data report, ensure that the data for positions and employees is available using the following components:

Extra Person Information Types:

- US Federal Retirement Data Reporting Info
- US Federal Retirement Data Report Bank Details
- US Federal Retirement Benefits
- US Federal Retirement Data OWCP
- US Federal Separation and Retirement
- US Federal Uniformed Services
- US Federal Person Benefit Information
- US Federal Person Retirement System Information

Extra Position Information Types:

US Federal Position Group 2

RPA Extra Information Types:

- US Federal Retirement Data Reporting

- US Federal Retirement Benefits
- US Fed Retire Data Report Separation and Retirement
- US Federal IPA Tribal Org Union Official Transfer
- US Federal Uniformed Services
- US Fed Non Pay or Non Duty
- US Fed Appointment with Transfer
- US Federal Retirement System Info

Running the Retirement Data Report

The Office of Personnel Management (OPM) requires agencies to submit retirement data about their employees to process retirements for Federal employees in a timely and accurate manner. OPM has detailed data reporting requirements for the Electronic Retirement Record (ERR) Data Feed. Oracle Federal HR provides the 'Retirement Data Report' to accomplish the reporting needs of the Guide to Human Resources Reporting (GHRR).

Important: This report is unique to OPM requirements as both HR and Payroll data must be submitted in the same file. As US Federal HR customers do not process with integrated payroll functionality, the extract files reflect only the HR Data. The Payroll provided segments must be merged with this report format at the sending site. The customers' payroll system is responsible for taking the HR Data provided, adding the Payroll data and then submitting the final transmission to OPM.

You must run the Retirement Data Report program first in a 'Preview Mode'. The Preview Mode enables HR users to review the data for accuracy and completeness. Once the HR user completes this review, the program can be submitted in a 'Final Mode', which creates the data file that is then sent to payroll for merging and final transmittal to OPM. Reports created are in XML format. The HR User can view the reports as a text file when opened from the View Log.

Use the Request Submit window.

To run the Retirement Data Report:

1. In the Name field, select Retirement Data Report.
2. Click the Parameters field to open the Parameters window. Enter the required parameters:
    - File Name: Name that you want to assign to the output file

- Business group: Business group for which you want to run the report.
- Agency Code
- Sub Element
- Additional Agencies or sub Element
- HR Data Provider Code
- Report Start Date
- Report End Date
- Processing Mode: Run the Retirement Data Report program first in a 'Preview Mode'.

3. Click OK to accept the Parameters and close the window.
4. Click Submit to generate the report.
5. To locate the path of the ASCII and XML files, in the View Requests window, select the row for the report and click View Log. The report generates an ASCII and an XML file. You can submit the resulting ASCII output to the OPM.

Complaint Tracking

Complaint Tracking Overview

Complaint tracking is the process of recording information about a charge of discrimination brought against an agency by one or more people. Using complaint tracking, you can record information about a complaint from the first contact by the complainant through the final outcome. You can also produce the annual EEO Form 462 report, a summary of the complaints processed that year, as a formatted PDF file.

Complaint Record

The Complaints Tracking window includes a series of alternate regions and task flow windows that capture information related to the complaint. You can maintain an accurate history of the complaint as it progresses, including entering multiple records for:

- People associated to a complaint
- Claims, bases, and incidents associated with a complaint
- Corrective actions that result from hearings or settlement meetings
- Alternative Dispute Resolution sessions conducted in the pre-complaint or formal complaint stages
- Complainant and agency appeals
- Agency costs associated to the complaint process

Progress of the Complaint

The Complaint Tracking window contains alternate regions that follow a standard complaint sequence and maintain a detailed record of the complaint. Business rules assist you in entering data that is complete and accurate.

Use the Complaints Tracking window to:

List complaint officials and servicing organizations

- Assign complaint officials to a complaint

You can list all the people associated with a single complaint, including everyone from witnesses to the Administrative Judges (AJ) who make the case decisions.

See: Displaying Complainant Information, page 6-28, Entering People Involved in

Processing a Compliant, page 6-26, Ending Periods of Service, page 6-28

- Enter the names of the organizations involved in servicing the complaint

See: Entering Complaint Office Names, page 6-27

Capture complaint details and the outcome of settlement agreements

- Record pre-complaint information

You enter information about a complaint in the pre-complaint phase in a sequence of alternate regions, including information about the complaint, counseling efforts, and the outcome of the pre-complaint process.

See: Initiating a Pre-Complaint, page 6-30

- Track complaint issues and bases

You can capture the reasons the complainant is filing a complaint by documenting the related claims, bases, and incidents.

See: Entering Claims, page 6-34

- Record formal complaint information

If the complaint evolves to a formal complaint, you can record that information as well as the results of investigations, hearings, settlement offers, and final agency actions and decisions.

See: Entering a Formal Complaint, page 6-33, Investigating a Complaint, page 6-35, Recording the Offer of Resolution, page 6-44, Issuing a Final Decision with a Hearing, page 6-45, Issuing a Final Action after a Hearing, page 6-47

- Capture the results of Alternative Dispute Resolution (ADR) sessions

During the pre-complaint or formal complaint stage, if the complainant engages in the ADR process, you can enter information about each session and its outcome.

See: Recording Alternative Dispute Resolutions, page 6-52

- Manage multiple complaints or complainants

If the complainant has more than one complaint, you can create a consolidated record.

See: Consolidating a Complaint, page 6-37

If several complainants file a class action, you can record key dates and decisions involved in the processing of the class action suit.

See: Processing a Class Action, page 6-39

Record corrective actions, appeals, and further courses of action

- List the required corrective actions resulting from hearings or settlement processes

You can enter any monetary or non-monetary corrective actions that the discriminating organization must fulfill before the agency can close a complaint.

- Record appeal actions brought by the complainant or discriminating organization

  See: Recording Corrective Actions, page 6-53

If the complainant or the discriminating organization disagrees with the decision reached on a complaint, you can enter information about the appeal actions, and if necessary, any subsequent Request for Reconsideration (RFR) actions.

See: Entering a Complainant Appeal, page 6-56, Entering an Agency Appeal, page 6-57, Processing a Request for Reconsideration, page 6-51

- Capture non-compliance information

If the discriminating organization does not perform a corrective action, the complainant may file a Petition for Enforcement (PFE). If the organization does not complete a corrective action or does not fulfill it in a timely manner, the complainant may file for Non-Compliance. The agency can capture the key dates and decisions involved in the filing of a PFE or Non-Compliance request.

See: Entering Non-Compliance Information, page 6-50, Entering a Petition for Non-Enforcement, page 6-48

Enter information about a civil action, if the complainant pursues that course of action.

See: Processing a Civil Action, page 6-40

Capture Complaint Costs

Agencies can capture costs associated to an EEO complaint. By capturing the direct costs such as administrative and legal costs as well as the indirect costs of the benefits the complainant receives, agencies can track costs at any point in the complaint process and quickly locate cost discrepancies.

The flexibility of obtaining cost information from detailed to total aggregate costs means that agencies can obtain the type of intelligence required in report preparation. Agencies can more fully evaluate the results of processing a complaint and use that data as a basis for predicting the costs involved in future complaint processing.

With these cost records, agencies can also more easily track the NO FEAR (Notification and Federal Employee Antidiscrimination and Retaliation Act of 2002) settlement costs for congressional reporting purposes.

See: Capturing Agency Complaint Costs, page 6-41

Conclude the complaint process

You can record the date the complaint process concludes and also describe details about the resolution of the complaint.

See: Closing a Formal Complaint, , page 6-38Reviewing Complaint Costs, page 6-41

Status of a Complaint

As the complaint progresses, you can record the stage or phase of the process in the header of the Complaint Tracking window. For example, you might note when the complaint is in the Pre-Complaint, Formal, or Hearing stage. The supplied list of values allows you to easily update the stage to reflect the current phase of the process.

Complaint Status

Most complaints involve a single complainant who initiates a complaint. Until you close the complaint, it is active. There are exceptions to this standard; for example, class actions involve multiple complainants, and consolidated complaints involve more than one complaint.

If you enter data that changes the complaint status from the standard description, for example, you close the complaint and it is now inactive, the application displays this status in the window title. The following is a list of statuses and the data item that when entered produce the change in status:

- Class Action when you select Class Agent in the Pre-Complaint region
- Consolidated when you enter a date in the Date Consolidated field of the Consolidated region
- Mixed when you select the Mixed check box for a claim in the Claims window
- Remanded when you enter Remand as the Office of Federal Operations (OFO) decision in the complainant Appeal window
- Inactive when you enter a date in the Date Complaint Closed field of the Closure region

Complaint Tracking Security

Only appropriate agency personnel should have access to the system's complaint tracking data due to the sensitive nature of EEO complaints.

The complaint tracking functionality uses standard HRMS security which controls within a business group who the user can access such as names displayed in the Complainant Name list of values and what the user can access (menus, taskflows, windows). Your system administrator can define a secure responsibility for employees who maintain EEO complaint information, as well as security profiles that further restrict access.

Complaint Attachments

Managing the paper work associated with a complaint can represent a substantial

portion of the time you spend tracking a complaint. By keeping documentation in the system, you reduce the need to keep track of documents on your desk. You can attach comments and documents to the Complaints Tracking window.

EEO Form 462 Report

You can generate and submit the annual EEO Form 462 report required by the US Equal Employment Opportunity (EEO) Commission that summarizes the details of each EEO complaint processed by your agency.

When you generate the report, you produce a PDF formatted version of the report that you can view with Adobe Acrobat Reader.

See: Producing a PDF EEO Form 462 Report, page 6-42

The complete EEO Form 462 Report you submit to OPM includes information not captured by the product. To complete the report with your agency's information, you can import the XML datafile output by the concurrent manager with the supplied PDF template and fill in the remaining information using a full version of Adobe Acrobat Reader.

See: Producing an Editable PDF EEO Form 462 Report, page 6-43

Setting Up Complaint Tracking

Before your agency enters a complaint into the system, you must set up the Complaint Tracking. Setup may involve implementing security, adding agency-specific information, and entering people in the system associated with the complaint.

To set up complaint tracking:

1. Define a secure responsibility for those users involved in complaint tracking.

   See: Setting Up Security, *Configuring, Reporting, and System Administration Guide*

2. Add Lookup values for:

   - Serviced HR Office (GHR_US_HR_OFFICE)
   - Serviced EEO Office (GHR_US_EEO_OFFICE)
   - Servicing Organization (GHR_US_SERVICED ORG)

     Servicing organizations are those involved in processing the complaints.

   - Discriminating organizations (GHR_US_DISCRIMINATING_ORG)

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

3. Add Lookup values to the predefined lists of values.

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

4. Define person types.

   By defining additional person types, such as ADR Facilitator or Administrative Judge, you can include information when you enter people in the system that allows you to query them by type of function.

   See: Defining Person Types, page 5-8

5. Define a request group for EEO reporting users.

   See: Request Groups, *Configuring, Reporting, and System Administration Guide*

6. Add agency-specific taskflows.

   See: Defining Taskflows, *Configuring, Reporting, and System Administration Guide*

7. Enter the following people into the application:

   - Complainants
   - People frequently involved in the processing of complaints such as Administrative Judges
   - People involved in processing a specific complaint such as attorneys and management officials

   See: Entering People Involved in Processing the Complaint, page 6-26

8. Generate docket numbers.

   If you do not want to enter docket numbers manually in the Complaint Tracking window, you can generate your own docket numbers using the same SQL operation that you do to generate numbers for Request Number field in an RPA (Request for Personal Action).

Using the Find Complaints Window

When you open the Complaint Tracking Window, the Find Complaints window automatically displays in front of it.

To begin a new complaint using the Find Complaints window:

1. Choose the New button.

To query a complaint using the Find Complaints window:

1. Enter a query on one or more of the following fields:
   - Docket Number
   - Complainant Name (complainant or class agent)
   - Complainant SSN (social security number)
   - Stage
2. To further narrow the search, you can also select the status of the complaint:
   - Class
   - Mixed
   - Remand
   - Consolidated
   - Active

     Note: To locate an inactive complaint, deselect the Active check box.
3. Choose the Find button to display the complaint.

   If the application locates more than one complaint that meets the selected criteria, it displays the complaints in the Complaint Tracking window. Choose Next Record from the Go menu to see the next complaint.

   If you close the Find Complaints window, you can reopen it by choosing the Find icon on the toolbar or choosing Find from the Query menu.

Entering People Involved in Processing a Complaint

You can enter people associated to a complaint including complainants and officials, such as the facilitators and administrative judges.

You use the People window to enter applicants, contacts, contract workers, and other people associated to the complaint. When you create the person records for these people, the records must exist in the same business group as the complaint. You can display the People window either from the Navigator (Complaints People) or the Complaints window (Person button). If you are working in the Complaints window, and want to resume work there after entering a person record, click the Person button.

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

After you create a record for the person in the application, you can:

- Enter that person in the Complaint window as the complainant and view information about that person.

  See Displaying Complainant Information, page 6-28

- Develop a list of officials and other participants in the complaint process in the EEO Complaint People window

  This window is a more restricted view of the People window and contains basic information, such as the person's role, name, social security number and start and end dates.

Use the Complaint People window to list those people involved in processing a complaint.

To list participants:

1. Query an existing complaint in the Complaint Tracking window.
2. Click the Complaint People button.
3. In the region list, choose All to view the entire list of roles that the official occupies.
4. In the Role column, choose the role that you want to assign the official.
5. In the name field, choose the name of the person you want to add to the list.
6. In the Start Date and End Date fields, enter the dates for their period of service.
7. Save your work.

   Some participants may have more than one role in the process, such as a counselor who also serves as an Alternative Dispute Resolution facilitator. Repeat these steps to create an additional entry for that person and specify a different role.

   When an official ends their period of service, you can capture the appropriate information, such as the last date of service. See: Ending Periods of Service, page 6-28.

Entering Complaint Office Names

The Offices region of the Complaint Tracking window stores the names of the offices involved in processing the complaint.

To enter an office name:

1. Open the Complaint Tracking window and query the complainant in the Find dialog.
2. In the Complaint Agency field, select the agency from the list of values.
3. In the HR Office field, select the appropriate office from the list of values.
4. In the EEO Office field, select the appropriate office from the list of values.
5. In the Organization field, select the name of the servicing organization processing the complaint from the list of values.

Ending Periods of Service

When you maintain information about people involved in the complaint process, you enter the date on which the person began their period of service in the assigned role. When the participant concludes his or her involvement, you can end-date their record.

Use the Complaint People window to delete entries or end date them.

To end-date someone's role:

1. Use the Find dialog or query the complaint in the Complaint Tracking window.
2. Choose the Complaint People taskflow button.
3. In the region list, choose All to display all the roles the person has ever occupied in the complaint process.
4. In the Name field, choose the name of the person whose role has ended.
5. In the End Date field, enter the date on which the person concluded their service.
6. Save your work.

Deleting Information

If you enter someone in error or that person never performs the role, you can delete that information. Select the row and choose Delete Record from the Edit menu. For information about deleting someone from the entire application, see Deleting People, *Workforce Sourcing, Deployment, and Talent Management Guide*.

Displaying Complainant Information

The Complaint Tracking window displays information about the complainant. To enter

a complainant or someone else associated with the complaint process, use the People window provided with the system.

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

Once you have entered someone in the system, you can query that person as a complainant, or add that person to the list of people involved in processing the complaint.

See: Entering People Involved in Processing a Complaint, page 6-26

Use the Complainant region to display information about a person who has filed a complaint.

To display complainant information:

1. Open the Complaint Tracking window and query the complainant in the Find dialog.
2. Choose the Complainant region to view information related to the person's employment.

   The information corresponds to the date you enter in the Pre-Complaint Initiated field of the Pre-Complaint alternate regions.

   Updating the Complainant's Personal Information

   When entering data in the Complaint Tracking window, you can update information such as address and phone numbers for the complainant.

   #### Complainant's Person Information

3. Choose the Person taskflow button.
4. Make any necessary changes to the person information stored in the alternate regions.
5. Save your work.

   #### Complainant's Address

6. Choose the Person taskflow button.
7. Choose the Address button.
8. Display the address you want to update by querying the address or choosing Next Record from the Query menu.

   You cannot change information in the primary address, but you can change information in other addresses maintained for the person.

9. Save your work.

Complainant's Phone Numbers

10. Choose the Person taskflow button.

11. Choose the Phones button.

12. To enter a new phone number, in the Type field, choose the kind of phone number, such as a business phone.

13. In the Phone Number field, enter the phone number.

14. In the Start and End Date fields, enter the dates when the phone number was in service.

15. Save your work.

    To edit the existing information, select the row and change the information stored in the Type, Phone Number, and Date fields as needed.

Initiating a Pre-Complaint

You initiate a complaint by entering information in the Complaint Tracking window, such as the Docket number, Stage, or the complainant's name.

As the pre-complaint process unfolds, you may enter information relevant to pre-complaint process in three regions of the Complaint Tracking window:

- Pre-Complaint

  The Pre-Complaint region captures basic information such as the date the alleged discriminating incident occurred.

- Pre-Complaint Counsel

  In the pre-complaint stage, complainants can choose traditional counseling as described in this procedure or the Alternative Dispute Resolution (ADR) process. See: Record Alternative Dispute Resolutions, page 6-52: page lxvii, page 6-30

- Pre-Complaint Closure

  If during the pre-complaint process, the claimant chooses to settle the complaint, you can capture those results in the pre-complaint closure window as described in this procedure.

To further document the complaint, you can enter information about the complainant's claims, the basis for these claims, and the related incidents. See: Entering Claims, page 6-34

Use the Complaint Tracking window to enter pre-complaint information.

To begin a new complaint:

1. Open the Complaint Tracking window and choose New in the Find window dialog.

2. In the Docket field, enter a Docket number assigned by the agency for tracking the complaint.

   You enter docket numbers associated with other stages of the complaint elsewhere. For example, you record the AJ Hearing docket number in the Hearing window.

3. In the Complainant Name field, choose the Complainant or Class Agent's name from the list of values.

   The application automatically enters the complainant's social security number, if available.

   > **Note:** Before you can enter complainant information, you must enter this person in the system. See: Entering People Involved in Processing a Complaint, page 6-26

4. From the Stage list of values, choose the description that represents the current phase of the complaint process.

5. Click additional details (the bracketed flexfield) to display the Additional Complaint Tracking Details window and complete the fields that your agency has defined.

6. Click OK to save your results and return to the Complaint window.

To begin a pre complaint:

1. Click the Pre-Complaint tab.

2. In the Information Inquiry field, enter the date on which the complainant began the inquiry.

3. In the Pre-Complaint Initiated field, enter the date on which the complainant filed the complaint in the Pre-Complaint stage.

4. In the Alleged Incident field, enter the date on which the alleged discriminating incident occurred.

   You can capture more specific details about the incident in the Claims window as explained in Entering Claims, page 6-34.

5. In the Rights/Responsibilities Letter Issued field, enter the date the agency sent this letter to the complainant.

6. In the Rights/Responsibilities Letter Received field, enter the date on which the complainant received the letter.

7. In Pre-Complaint Description, enter information about the complaint.

8. In the Pre-Complaint Election field, enter the method the complainant chooses to process the pre-complaint.

9. In the Alleged Discrim Org field, choose the name of the discriminating organization from the list of values.

10. In the Class Agent field, choose Yes if the complainant is also the class agent for a class action.

11. Save your work.

Pre-complaint counseling:

1. Select the Pre-Compl Counseling tab.

2. Enter the dates on which the following actions occurred:
   - Counselor Assigned
   - Initial Counselor Interview conducted
   - Counseling Extension letter sent

3. In Anonymity Requested, choose Yes if the complainant requested anonymity.

   Note: This field is for information purposes only.

4. In the Traditional Counsel Outcome field, indicate whether counseling resolved the complaint.

5. Save your work.

Pre-complaint closure:

1. Click the Pre-Compl Closure tab.

2. Enter the dates on which the following actions occurred:
   - Final Interview conducted
   - RTF (Right to File notice) received by the complainant's representative

- Pre-Complaint Closed
- Counselor's Report Submitted

3. In the Pre-Complaint Closure field, choose a description from the list of values that describes the outcome.
4. Save your work.

Entering a Formal Complaint

If the complainant chooses to pursue a formal complaint, you can capture that information in the Formal Complaint region of the Complaint Tracking window.

To enter information about a formal complaint:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Click the Formal Complaint tab.
3. In the Formal Complaint Filed field, enter the date on which the complainant filed a formal complaint.
4. In the Acknowledgement Letter, enter the date on which the agency sent an acknowledgement letter to the complainant or the complainant's representative.
5. In the Clarification Letter, enter the date on which the agency sent a clarification letter.
6. In the Compl Resp to Clarification Letter, enter the date on which the agency received the complainant's response.
7. In the Forwarded for Legal Review field, enter the date on which the agency forwarded the complainant's response to the agency legal department.
8. In the Returned from Legal field, enter the date on which the agency received the reply from the legal department.
9. From the Letter Type list of values, choose the type of letter the agency sent to describe its next action on the complaint.
10. In the Letter Date field, enter the date on which the agency sent the agency's response to the formal complaint to the complainant.
11. In the Date Letter Received field, enter the date on which the complainant received the agency's letter.

12. Save your work.

Entering Claims

The claims, bases, and incidents that comprise a complaint document the reasons why a complainant filed a complaint. This documentation includes the claim or charge brought by the complainant, the basis or laws the complainant reports were violated, and the incidents that describe the actions which led to the claim.

A complaint may include one or more claims and each claim may arise from one or more incidents and have one or more bases. You add a claim to a complaint at the request of the complainant or administrative judge. If you add a claim or incident after entering the formal complaint process, the complaint is considered an amended complaint.

Use the Claims window to enter details on claims, bases, and incidents.

To enter a claim:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the Claims taskflow button.
3. In the Claim field, choose the type of claim from the list of values.
4. In the Claim Date field, enter the date you first recorded the claim.
5. In the Phase field, choose the stage the complaint had reached when you first recorded this claim.
6. Select the Mixed check box if the Equal Employment Opportunity Council (EEOC) defines this claim as a Mixed Claim.

   When you designate mixed for a claim, the application adds the status of Mixed to the Complaint Tracking window title.
7. In the Claim Source field, choose the reason from the list of values that you are adding the claim at this time.
8. In the AG field, indicate whether the agency accepted or dismissed the claim.
9. In the AJ field, indicate whether the administrative judge accepted or dismissed the claim.
10. In the AG Appeal field, indicate whether or not the agency appealed the administrative judge's findings.

    If the agency did appeal the decision, you can find out more information about the

appeal by choosing the Agency Appeal taskflow button. See: Entering an Agency appeal, page 6-57.

11. Save your work.

Entering Bases

12. Select the claim for which you want to enter a basis.
13. Choose the Bases alternate region.
14. In the Basis field, choose the Basis of the complaint from the list of values.
15. In the Value field, choose an applicable value that describes the basis.
16. In the Statute field, choose the Statute that supports the basis.
17. In the AG Findings field, enter the agency's decision.
18. In the AJ Findings field, enter the administrative judge's decision.
19. Save your work.

Entering Incidents

20. Select the claim for which you want to enter an incident.
21. Choose the Incidents alternate region.
22. In the Incident Date field, enter the date on which the incident occurred.
23. In the Description field, enter information about the incident.
24. In the Amended Date field, enter the date on which the incident occurred.

    If you are adding an incident prior to the first incident or that occurs after the case is under investigation, you can enter that incident as an amended incident.

25. In the Acknowledged Date field, enter the date on which the agency sent an acknowledgment letter.
26. Attach documentation that further describes the complaint, if necessary.
27. Save your work.

Investigating a Complaint

An agency may conduct an investigation, for example, upon the filing of a formal

complaint or as a result of an administrative judge's decision. You can capture information about the investigation and the options that result in the Investigation region of the Complaint Tracking window.

To enter information about an investigation:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the Investigation alternate region.
3. From the Investigation Source list of values, indicate who initiated the request, such as the agency or the Office of Federal Operations (OFO).

Investigator

4. In the Date Requested field, enter the date on which the agency sent a letter to the office that assigns investigators to request an investigator.
5. In the Date Request Received field, enter the date on which the agency office received the agency's request for an investigator.
6. In the Date Assigned field, enter the date on which the agency office assigned an investigator.

Report of Investigation (ROI)

7. In the Date Agency Received field, enter the date on which the agency received the ROI.
8. In the Date Compl-Rep Received, enter the date on which the complainant's representative received the ROI.

Investigation

9. In the Date Started field, enter the date on which the investigation began.
10. In the Date Ended field, enter the date on which the investigation ended.
11. If the investigation was extended, in the Date Extended field, enter the date on which the extension was approved.
12. In the Extension Description field, choose from the Extension Description list of values the reason for the extension.

Options Letter

13. In the Options Letter Date field, enter the Options letter states what the complainant can do next. Enter the date on which the agency sent the Options letter.

14. In the Date Compl-Rep Received field, enter the date the complainant's representative received the Options letter.

15. In the Compl-Rep Response field, choose the Compl-Rep Response from the list of values that describes the response of the complainant's representative to the Options letter.

    If the complainant requests a final decision from the agency (FAD), you can record information about the FAD. See: Issuing a Final Decision without a Hearing, page 6-45. If the complainant requests a hearing, see: Documenting the Complaint Hearing, page 6-46.

Consolidating a Complaint

When you consolidate a complaint, for example prior to a hearing, you create one parent docket. As the complaint process continues, you record any further information about the complaint on this parent docket. For cross-reference purposes, you must enter the parent docket number on each complaint included in the consolidated set.

Use the Consolidation region of the Complaints Tracking window to record information about consolidated complaints.

To consolidate a complaint:

1. Open the Complaint Tracking window and query the complaint that will serve as the parent complaint in the Find dialog.

2. Choose the Consolidated region.

3. The application automatically updates the Records in Set field as you enter the parent docket number in each of the complaints included in the set of consolidated complaints.

4. In the Date Consolidated field, enter the date on which you batched the individual complaints into one consolidated set.

5. In the Parent Docket Number, choose the docket number for the displayed complaint.

6. In the Stage Consolidated field, choose the point in the complaint process at which the complaint was consolidated.

7. In the Date Compl-Rep Notified field, enter the date on which you notified the complainant's representative that you consolidated the complaint.

8. In the Consolidation Description, enter any further information or explanation about the consolidated complaint.

9. Save your work.

Member Complaints

To display an accurate count of all records in the consolidated set, enter the parent docket number in each complaint included in the consolidated set.

To record consolidation information on each member complaint:

1. Open the Complaint Tracking window and query one of the complaints included in the consolidated set.
2. Choose the Consolidated region.
3. In the Parent Docket Number, choose the docket number for the parent complaint.

   The parent docket number serves as a reference field. You enter all subsequent information about the complaint on the parent complaint.
4. Optionally, enter the same information you entered in the parent complaint Consolidation region in the following fields:
   - Date Consolidated
   - Stage Consolidated
   - Date Compl-Rep Notified
   - Consolidation Description
   - Records in Set
5. Save your work.

   Repeat this procedure until you have entered the parent docket number in all the complaints included in the consolidated set.

Closing a Formal Complaint

When a formal complaint process ends, you can record information about its outcome in the Closure region of the Complaint Tracking window.

To close a formal complaint:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the Closure region.
3. In the Date Complaint Closed field, enter the date on which the formal complaint

concluded.

After you enter this date, it is advisable not to update the complaint although the application does not prevent you from doing so.

4. In the Nature of Closure field, choose the action that brings the complaint to a conclusion.

5. In the Description field, enter any further information you want to record about closing the complaint.

6. In the Audited By field, select the person or the role of the person who performed the audit.

7. In the Record Received field, enter the date.

8. Save your work.

   The Complaint Tracking window now displays a status of Inactive. Later, when you query this complaint in the Find window, deselect the Active check box to have the application locate and display the complaint.

Processing a Class Action

When you process a class action, you can begin at either the pre-complaint or formal complaint stage. As the class action proceeds, you can record pertinent information such as specifying the class agent and entering key dates about the filings, briefs, the hearing and its final outcome.

To process a class action:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.

2. Choose the Pre-Complaint region and select the Class Agent field to note that the complainant is the class agent.

   See: Initiating a Pre-Complaint, page 6-30.

3. Choose the Class Action region.

4. In the Filed Formal Class field, enter the date on which the complainant filed a Class Action.

5. In the Forwarded to EEOC field, enter the date on which the agency sent the class action request to the Equal Employment Opportunity Council (EEOC).

6. In the Date Class Members Notified field, enter the date on which the agency notified the class agent or complainant's representative of the administrative judge's

decision on the certification of the class action.

7. In the Number of Complainants field, enter the total number of people who are complainants named in the class action.

8. In the Agency Brief to EEOC field, enter the date on which the agency sent its class action brief to the EEOC.

9. In the Date AJ Cert Decision field, enter the date on which the administrative judge issued a decision, certifying or dismissing the class action.

10. In the Decision field, choose the decision that summarizes the administrative judge finding on certification.

11. In the Date Agency Received field, enter the date on which the agency received the administrative judge's decision on certification.

12. In the Hearing Date field, enter the date scheduled for the hearing.

13. In the Date AJ Decision field, enter the date on which the administrative judge issued a decision on the class action.

14. In the Decision field, choose the decision that summarizes the administrative judge's finding on the class action.

15. In the Date Agency Received field, enter the date on which the agency received the administrative judge's decision on the class action.

16. Save your work.

Processing a Civil Action

After the agency, EEOC administrative judge, or the Office of Federal Operations releases a decision, the employee may choose to file a civil action. You can capture information about these proceedings in the Civil Action region of the Complaint Tracking window.

To enter information about a civil action:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.

2. Choose the Civil Action alternate region.

3. In the Civil Action Filed field, enter the date on which the complainant filed the civil action.

4. In the Agency Notified field, enter the date on which the complainant notified the

agency that a civil action was filed.

5. In the Agency Closure Confirmed field, enter the date on which you confirmed that the complaint was closed and turned over to the civil courts.

   The date you enter here is usually the same date entered as the Date Complaint Closed field in the Closure alternate region.

6. Save your work.

Reviewing Complaint Costs

During the complaint process, you can monitor the costs incurred to date by viewing a summary of the total agency costs and benefits received (costs stemming from monetary corrective actions).

Use the Complaints window to view a summary of all complaint costs.

To review complaint costs:

1. Query an existing complaint.

2. Set your effective date to the current date to view the total costs entered as of that date.

3. Select the Costs tab.

   The Costs block displays agency costs by for each phase and stage.

   The Totals block displays the subtotals for all Agency Costs and Benefits Received, and a total of both these direct and indirect costs.

Capturing Agency Complaint Costs

The costs of processing an EEO Complaint include those costs the agency incurs, such as administrative costs, court reporter fees, and mediator payments. During the Pre Complaint or Formal Compliant, you can record details about each separate cost, including the stage of the process, the type of cost, the date, the amount, and a brief description. The Cost window also lets you query cost records according to different criteria. For example, you might view a list of Contract Mediator costs associated with the Investigation stage of the Formal Complaint phase.

Use the Complaint Agency Costs window to enter agency costs.

To record agency costs associated to a complaint:

1. Query an existing Complaint in the Find Complaints window and click Agency Costs.

2. In the Agency Costs block, select the appropriate Phase, Stage and Category:

   - If you are entering a list of costs that span different phases, stages, and categories, select All for the Phase, Stage, and Category.

   - If you are entering several costs related to a specific phase, stage or category, select the appropriate value from Phase, Stage, and Category lists.

   The application enters this information in the Agency Cost Details region.

3. In the Agency Cost Details block, each row corresponds to a different cost. Select the applicable Phase, Stage, and cost Category.

4. In the Cost Date field, select the date in the calendar on which you incurred the cost, for example the invoice date.

5. In the Amount field, enter the actual cost in dollars.

6. In the Description field, enter additional information about the cost.

7. Save your work.

8. Repeat these steps to enter further costs details.

Producing a PDF EEO Form 462 Report

You can generate and submit the annual EEO Form 462 report that summarizes the details of each EEO complaint processed by your agency. When you generate the report, you produce a PDF formatted version of the report that you can view with Adobe Acrobat Reader.

A complete EEO Form 462 Report includes information not captured by the product. You can produce a PDF file and enter the missing information using Adobe Acrobat.

See: Producing an Editable PDF EEO Form 462 Report, page 6-43

Use the Submit Request window to generate the PDF EEO Form 462 report:

To run the EEO Form 426 Report:

1. In the Name field, choose EEO Form 462 Report.

2. In the Parameters dialog, complete the following:

   - Agency Code

   - Reporting Period Begins

   - Reporting Period Ends

3. Click OK to close the Parameters dialog.

4. Click Submit to run your report.

   In the View Requests window, you can click View Output to view the resulting PDF file.

Producing an Editable PDF EEO Form 462 Report

When you generate the EEO Form 462 report from the concurrent manager, you produce a PDF formatted version that you can view with Adobe Acrobat Reader. The EEO Form 462 report that you submit requires other information not captured by the product:

- Part III Agency Resources, Training, Reporting Line
- Part IX Summary of Investigations Completed
- Part XII Summary of ADR Program Activities
- Certification and Contact Information

You can complete the required information by importing the XML datafile into the supplied PDF template, and then entering the remaining information using Adobe Acrobat.

To generate an EEO Form 462 Report you can edit:

1. Run the EEO Form 462 concurrent manager report from the Submit Requests window.

   See: Producing a PDF EEO Form 462 Report, page 6-42

2. Locate the XML datafile.

   From the View Requests window, select the row for the EEO report and click View Log.

   You can find the path for the XML datafile at the end of the log file.

3. Transfer the XML datafile to your home directory and rename the datafile, changing the extension from .xml to .xfdf

4. Locate the supplied report template (ghr_462_report.pdf) under $GHR_TOP/html and transfer it to the same directory where you moved the renamed XML datafile.

To import the datafile into Adobe Acrobat:

1. Using the full version of Adobe Acrobat, open the Form 462 report template.

2. Select Import Form Data from the File menu. In the resulting Select File Containing Form dialog box, select Adobe XFDF Files from the Object of Types menu. Locate and select the datafile and click Select to close the dialog box and have the application import your data into the template.

3. Select Save As from the File menu and save the template with the imported data under a meaningful filename. (Using the Save As command preserves the original template in case you choose to repeat this procedure at a future time.)

To complete the final report:

1. Enter any missing information required to complete the report.

2. Print and then submit the resulting report.

Recording the Offer of Resolution

If you extend an Offer of Resolution to the complainant; for example, following an investigation, you can capture information about that offer, including key dates and the complainant's response.

Use the Offer of Resolution region of the Complaints Tracking window to enter information about the offer.

To enter information about an Offer of Resolution:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.

2. Choose the Offer of Resolution region.

3. In the Offer of Resolution field, enter the date on which the agency sent the Offer of Resolution.

4. In the Compl-Rep Received field, enter the date on which the complainant's representative received the offer.

5. In the Date Compl-Rep Response field, enter the date on which the complainant's representative responded to the offer.

6. In the Signed field, enter the date on which either the complainant or the complainant's representative signed the response.

7. In the Compl-Rep Response field, indicate whether the complainant accepted the Offer of Resolution.

8. In the Description field, summarize further information about the offer.

9. Save your work.

   If the Offer of Resolution includes corrective actions, you can enter detailed information in the Corrective Actions window. See: Recording Corrective Actions, page 6-53.

   If the complainant accepts the Offer of Resolution, you can close the complaint by completing the information in the Closure region as explained in Closing a Formal Complaint, page 6-38

Issuing a Final Decision without a Hearing

If you reach a Final Agency Decision (FAD) during the formal complaint process, you can document the findings, such as whether the complaint had merit, and any conclusions that brought the complaint to a close.

Use the Final Action No Hearing region of the Complaints Tracking window to enter information about the FAD.

To enter information about the Final Agency Decision:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the Final Action No Hearing alternate region.
3. From the FAD Source list of values, choose the source that is requesting the FAD, for example the agency or administrative judge.
4. In the FAD Requested field, enter the date on which the source listed above requested the FAD.
5. In the EEO Recvd FAD Req field, enter the date on which the EEO office received the FAD request.
6. In the FAD Req Forwarded AG field, enter the date the FAD request was forwarded by the servicing organization to the agency.
7. In the Agency Received Req field, enter the date on which the agency received the FAD request.
8. In the FAD Due field, enter the date on which the FAD is due.
9. In the Forwarded to Compl-Rep field, enter the date you forwarded the FAD to the complainant or to the complainant's representative.
10. In the Received by Compl-Rep field, enter the date the complainant or the complainant's representative received the FAD.

11. In the Implementation Letter Forwarded to Org field, enter the date that you sent the letter to implement the FAD to the discriminating organization.

12. In the Decision Forwarded for Legal, enter the date you forwarded the FAD to the agency's legal department.

13. In the Decision Received from Legal, enter the date the legal department received the FAD.

14. In the FAD Type, choose the appropriate FAD check boxes to indicate whether:
    - the agency decides on the merit of the complaint
    - the agency decides to award the complainant's Attorney Fees
    - the agency decides to award the complainant's Compensatory Damages
    - the agency decides that the discriminating organization is in Non-Compliance, for example, with an EEO law, a negotiated agreement, or a previous complaint decision

15. In the FAD Date field, enter the date the agency issued the FAD.

16. In the Decision field, choose the action that describes the agency's decision contained in the FAD.

17. Save your work.

    If the agency determines that there is no finding, you can conclude the complaint by completing the information in the Closure region as explained in Closing a Formal Complaint, page 6-38. If the agency determines that corrective actions are required, you can enter that information in the Corrective Actions window. See: Recording Corrective Actions, page 6-53

Documenting the Complaint Hearing

If a complainant requests a hearing, you can record pertinent information about the hearing, such as the hearing docket number, and the administrative judge's rulings on the merit of the complaint and corrective actions.

To enter information about the hearing:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.

2. Choose the Hearing alternate region.

3. In the Date Hearing Requested field, enter the date on which the complainant

requesting the hearing.

4. In the Source of Hearing field, choose a value that describes who is going to conduct the hearing, such as an administrative judge.

5. In the Date Agency Notified field, enter the date on which the agency received notice about the complainant's request for a hearing.

6. In the Date Agency Forwarded Files field, enter the date on which the agency forwarded the files to the administrative judge or Office of Federal Operations (OFO).

7. In the Hearing Docket Number field, enter the docket number for the hearing assigned by the administrative judge or OFO.

8. In the Date Hearing Completed field, enter the date on which the hearing concludes.

9. In the Date AJ Merit Decision field, enter the date the administrative judge ruled on the merit of the complaint.

10. In the Decision field, choose the outcome of the administrative judge's findings on the merit of the complaint.

11. In the Date Agency Recvd AJ Merit Decision, enter the date on which the agency received the administrative judge's decision on merit.

12. In the Date AJ CA Decision field, enter the date on which the administrative judge ruled on the corrective actions.

13. In the Decision field, choose the outcome of the administrative judge's decision on corrective actions.

    If the decision includes corrective actions, you can enter detailed information in the Corrective Actions window. See: Recording Corrective Actions, page 6-53.

14. In the Date Agency Recvd AJ CA Decision, enter the date the agency received the administrative judge's decision on corrective actions.

15. Save your work.

Issuing a Final Action after a Hearing

When you reach a Final Agency Action (FAA) after a hearing, you can capture information about that decision as well as the dates for sending documentation to the complainant's representative, the discriminating organization, and your legal department.

To enter information about the Final Action:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the Final Action After Hearing alternate region.
3. From the Final Action Source list of values, indicate who ordered the final action.
4. In the Final Action Due field, enter the date by which the agency must submit the final decision.
5. In the Forwarded to Compl-Rep field, enter the date you forwarded the decision to the complainant's representative.
6. In the Received by Compl-Rep field, enter the date the complainant's representative received the decision.
7. In the Implementation Letter to Org field, enter the date that you sent the letter to implement the decision to the discriminating organization.
8. In the Decision Forwarded to Legal field, enter the date you forwarded the decision to the agency's legal department.
9. In the Decision Received from Legal field, enter the date the agency's legal department received the decision.
10. In the Final Action Date, enter the date on which the source reached the Final Action Decision.
11. In the Decision field, choose a description that represents the agency's final decision.
12. Save your work.

    If the agency determines that there is no finding, you can conclude the complaint by completing the information in the Closure region as explained in Closing a Formal Complaint, page 6-38.

    If the agency determines that corrective actions are required, you can enter that information in the Corrective Actions window. See: Recording Corrective Actions, page 6-53

Entering a Petition for Non-Enforcement

If an agency has not yet performed a corrective action, the complainant can file a Petition for Non-Enforcement (PFE) against the agency with the Office of Federal Operations (OFO).

You enter information about the PFE and its outcome in the PFE and Non Compliance region of the Corrective Actions window.

To enter information about a PFE:

1. Open the Complaint Tracking window and query the complainant in the Find dialog.

2. Choose the Corrective Actions taskflow button.

3. If you have not previously entered a corrective action, enter the Corrective Action header information. See Entering Corrective Actions, page 6-53.

4. If you have more than one corrective action, select the appropriate corrective action by choosing Next Record from the Query menu.

5. Choose the PFE and Non Compliance region.

6. In the Petition for Enforcement section, enter the PFE Docket Number.

7. In the Received field, enter the date on which the agency received the PFE from the OFO.

8. In the Agency Brief Due field, enter the date by which the agency must forward their brief to the OFO.

9. In the Agency Brief field, enter the date on which the agency sent their brief to the OFO.

10. In the Decision field, enter the date on which the OFO rendered a decision on the complainant's PFE.

11. In the AG Received field, enter the date on which the agency received the decision.

12. In the AG Brief Forwarded field, enter the date on which the agency forwarded the brief to the discriminating organization.

13. In the Decision field, choose a description that summarizes the OFO's decision on the PFE.

14. Save your work.

    If the OFO determines that there is no finding, you can conclude the complaint by completing the information in the Closure region, as explained in Closing a Formal Complaint, page 6-38. If the OFO determines that further corrective actions are required, you can enter that information in the Corrective Actions region. See: Recording Corrective Actions, page 6-53

Entering Non-Compliance Information

If an agency does not complete a corrective action at the scheduled time, or the actions are unsatisfactory, the complainant can file for Non Compliance with the OFO.

You enter information about non-compliance in the PFE and Non Compliance region of the Corrective Actions window.

To enter information when an agency is non-compliant:

1. Open the Complaint Tracking window and query the complainant in the Find dialog.
2. Choose the Corrective Actions taskflow button.
3. If you have not previously entered a corrective action, enter the Corrective Action header information. See Entering Corrective Actions, page 6-53.
4. If you have more than one corrective action, select the appropriate corrective action by choosing Next Record from the Query menu.
5. Choose the PFE and Non Compliance alternate region.
6. From the Compl-Rep Req list of values, indicate whether the complainant filed based on the failure to implement the corrective action or the unsatisfactory results (reinstatement).
7. In the Agency Notified field, enter the date on which the OFO notified the agency of the complainant's filing for non-compliance.
8. In the EEO Req Data field, enter the date on which the EEO office requested data from the discriminating organization explaining why they are non-compliant.
9. In the Org Forwarded Data field, enter the date on which the discriminating organization forwarded the requested data to the agency's EEO office.
10. .In the Decision Implemented field, enter the date on which the EEO office implemented a decision on the non-compliance request.
11. In the Compl Reinstated field, enter the date on which the EEO reinstated the complaint.
12. In the Stage Compl Reinstated field, indicate at what stage in the complaint process the agency reinstated the complaint.
13. Save your work.

Processing a Request for Reconsideration

The complainant or agency can request that the Office of Federal Operations (OFO) reconsider the ruling on an appeal. If the complainant or agency requests a Request for Reconsideration (RFR) , you can capture the key dates involved in processing the RFR as well as the OFO's decision to deny or grant the RFR.

Use the Request for Reconsideration alternate region to enter RFR data.

To record a Request for Reconsideration:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the appropriate Appeals taskflow button:
   - If you are processing an RFR for a complainant, choose the Appeals taskflow button
   - If you are processing an RFR for an agency, choose the Agency Appeals taskflow button
3. If you have more than one appeal, query the appeal for which you want to process the RFR by choosing Next Record from the Query menu.
4. Choose the Request for Reconsideration region.
5. In the RFR Docket Number field, enter the docket number assigned by the OFO.
6. In the RFR Requested by field, indicate whether the complainant or agency is filing the complaint appeal.
7. In the Agency Filing Due field, enter the date by which the agency must file the complaint appeal.
8. In the RFR Date field, enter the date on which the agency filed for an RFR.
9. In the Agency RFR Brief Due field, enter the date on which the agency must submit the RFR to the OFO.
10. In the RFR Forwarded to Org field, enter the date on which the agency sent the RFR brief to the discriminating organization.
11. In the Orgn Forwarded RFR to Agency field, enter the date by which the discriminating organization must return the RFR brief to the agency.
12. In the Agency Forwarded RFR to OFO field, enter the date on which the agency sent the RFR brief to the OFO.

13. In the Date RFR Decision field, enter the date on which the OFO issued a decision on the RFR.

14. In the Decision field, choose the description that summarizes the OFO's decision.

15. In the Agency Received RFR Decision field, enter the date on which the agency received the OFO's decision on the RFR.

16. In the RFR Decision Forwarded to Org, enter the date on which the agency sent the OFO's decision to the discriminating organization.

17. Save your work.

    If as a result of the RFR, the OFO determines that there is no finding, you can conclude the complaint by completing the information in the Closure region. See: Closing a Formal Complaint, page 6-38.

    If the OFO determines that further corrective actions are required, you can enter that information in the Corrective Actions region. See Recording Corrective Actions, page 6-53.

Recording Alternative Dispute Resolutions

During the course of a complaint, the agency and the complainant may attempt to resolve the complaint through the Alternative Dispute Resolution (ADR) process.

You can record the results of each ADR session, noting at what stage of the process the ADR occurred, whether another agency or organization facilitated the session, the method of resolving the dispute, and the final outcome.

Use the Alternative Dispute Resolution window to enter information about each ADR session.

To enter information about an ADR session:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.

2. Choose the ADR taskflow button.

3. In the ADR Offered field, choose Yes if you offered the complainant the Alternative Dispute Resolution process as a method of resolving the complaint.

4. From the Stage Utilized list of values, indicate at what point in the complaint process the agency and complainant used the ADR process.

   The ADR process may occur in the pre-complaint or formal complaint stage. If it occurs in the pre-complaint stage, you indicate that you have offered the complainant the choice of an ADR session in the Pre-Complaint region. See: Initiating a Pre-Complaint, page 6-30

5. Enter a Date Accepted.

6. Enter a Date Started.

7. Enter a Date Ended.

8. Choose the Resource for the ADR facilitation from the list of values.

9. Choose the Technique employed in resolving the complaint from the list of values.

10. Choose an Outcome from the list of values that describes the results of the ADR session.

11. Save your work.

    If the ADR outcome includes corrective actions, you can enter detailed information in the Corrective Actions window. See: Recording Corrective Actions, page 6-53.

    If the ADR outcome resolves the complaint, you can close the complaint by completing the information in the Closure region as explained in Closing a Formal Complaint, page 6-38

Creating Additional ADR Records

If you engage in subsequent ADR sessions later in the complaint process, you can create an ADR record for each session.

To create a new ADR record:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.

2. Choose the ADR taskflow button.

3. Choose New Record from the Edit menu or position your cursor in the Stage Utilized field and press the down arrow key on your keyboard.

4. Follow the steps in the procedure above to enter information about the ADR session.

   To view different ADR sessions, position your cursor in the Stage Utilized field and press the down arrow.

   If you made an incorrect ADR entry, you can clear a field by choosing Clear Field from the Edit menu, or if necessary, delete the record by choosing Delete Record from the Edit menu.

Recording Corrective Actions

Settlement of a complaint may involve orders that describe monetary and

non-monetary corrective actions that an agency must complete before closing a complaint. For example, a decision might include two actions such as a retroactive promotion for the complainant and EEO training for the discriminating manager. These corrective actions may result from an Offer of Resolution, Alternative Dispute Resolution (ADR) session, Hearing decision, Final Agency Decision, an Office of Federal Operations (OFO) or Merit Systems Protection Board (MSPB).

If a corrective action involves a monetary payment, you can record the amount and later view the total for all benefits received in the Costs tab. Here you can also find the total costs incurred by the agency in processing the complaint.

See: Reviewing Complaint Costs, page 6-41

You record each corrective action along with its accompanying details in the Corrective Actions window.

To record corrective actions:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Click the Corrective Actions button.

Corrective Action Header

3. From the Corrective Action Source list of values, indicate who ordered the corrective action.
4. In the Date Last Compl Report, enter the date of the last compliance report.
5. In the Date Closed field, enter the date by which the agency must complete the corrective action.
6. In the Complaint Docket Number field, enter the AJ Hearing docket number.

   Note: A docket number is not required if the corrective action results from an Offer of Resolution, Alternative Dispute Resolution session, or Final Agency Decision.

7. In the Appeal Docket Number field, enter the:
   - OFO or MSPB appeal docket number, if the corrective action results from an OFO or MSPB appeal
   - RFR docket number, if the corrective action results from a RFR remand decision

Corrective Action Details

8. Choose the Corrective Action Details region.

9. In the Action Type field, choose a description for the corrective action.

10. In the Category field, choose whether the action is monetary or non-monetary.

11. In the Payment Type field, choose the description that corresponds to the type of payment.

12. In the Amount field, enter an amount if the action involves monetary compensation.

13. In the Phase field, choose the phase of the complaint during the corrective action occurred.

14. In the Description field, enter a description of the required action.

15. In the Due Date field, enter the date on which the agency must complete the action.

16. In the Order Date field, enter the date on which the source such as the OFO ordered the corrective action.

17. In the Request Date field, enter the date on which the administrative judge or the OFO requested that the agency complete the corrective action.

18. In the Complete Date field, enter the date on which the agency completes the action.

19. In the Category field, indicate whether the action involves monetary or non-monetary relief.

20. In the Type field, enter the description of the type of action to be taken.

21. In the Phase field, choose the stage of the complaint process at which this action is being taken, for example, as a result of an ADR process.

22. In the Description field, enter any further information required to describe the specific corrective action.

23. To add further Corrective Details, repeat the steps above for adding Corrective Action Details.

24. Save your work.

    If you enter information in error, you can delete a corrective action detail by selecting the row that you want to delete and choosing Delete Record from the Edit menu.

Multiple Corrective Actions

If subsequent complaint procedures result in further corrective actions, you can create additional corrective action records by creating a new record, completing the

header information and supplying the corrective action details as described in the steps above for recording corrective actions.

Entering a Complainant Appeal

If a complainant disagrees with a decision reached on a complaint, the complainant can appeal the decision to the Office of Federal Operations (OFO), or to the Merit Systems Protection Board (MSPB), if it is a mixed complaint. You can record information about the appeal process, such as key dates for case files and briefs, as well as the outcome of the appeal process.

Use the Appeals window to enter complainant appeal information.

To enter information about the complainant appeal:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the Appeals taskflow button.

Appeal Information

3. If you have not already done so, complete the appeal information. In the Appealed To field, choose the office to which you are requesting the appeal.
4. In the Appeal Reason field, choose the basis for the appeal from the list of values.
5. In the Docket Number field, enter the complainant appeal docket number assigned by the OFO or MSPB.
6. In the Appeal Date field, enter the date on which the complainant filed the appeal.
7. In the Source Decision Date field, enter the date on which the OFO or MSPB agreed to hear the appeal.
8. In the Date Org Notified field, enter the date on which you notified the discriminating organization that the complainant is filing an appeal.
9. Choose the Appeals Details alternate region.

Case Files

10. In the Agency Received Request field, enter the date on which the agency received the request from the OFO or MSPB for the case files.
11. In the Case Files Due field, enter the date by which the case files must arrive at the OFO or MSPB.
12. In the Case Files Forwarded field, enter the date on which the agency sent the case

files to the OFO or MSPB.

Briefs

13. In the Agency Received Appellant Brief field, enter the date on which the agency received the complainant's brief.

14. In the Appellant Brief Forwarded to Org field, enter the date on which the agency sent the appellant brief to the discriminating org.

15. In the Org Forwarded Brief to Agency field, enter the date on which the discriminating organization sent the brief to the agency.

16. In the Agency Brief Due field, enter the date on which the agency must send its brief to the OFO or MSPB.

17. In the Agency Brief Forwarded field, enter the date on which the agency sent the brief to the OFO or MSPB.

Appeal Decision

18. In the Appeal Decision field, enter the date on which the OFO or MSPB reached a decision on the appeal.

19. In the Agency Received Decision field, enter the date on which agency received the decision.

20. In the Forwarded to Org field, enter the date on which the agency sent the decision to the discriminating organization.

21. In the Decision field, choose the result that summarizes the decision from the list of values.

22. Save your work.

    If the complainant is appealing more than one corrective action or an entire decision, choose New Record from the Edit menu and repeat this procedure to enter data about each appeal.

    If you disagree with the OFO's appeal decision, you can process a Request for Reconsideration. See Processing a Request for Reconsideration, page 6-51

Entering an Agency Appeal

If the discriminating organization disagrees with the decision reached on a complaint or on specific corrective actions, the agency can file an appeal to the Office of Federal Operations (OFO).

You can record information about the appeal process, such as key dates for case files

and briefs in the Agency Appeals window.

To enter information about the agency appeal:

1. Open the Complaint Tracking window and query the complaint in the Find dialog.
2. Choose the Agency Appeals taskflow button.

Appeal Information

3. In the Appeal Reason field, choose the basis for the appeal from the list of values.
4. In the Docket Number field, enter the appeal docket number assigned by the OFO or Equal Employment Opportunity Council (EEOC).
5. In the Appeal Date field, enter the date on which the agency filed the appeal.
6. In the Source Decision Date field, enter the date the OFO agreed to hear the appeal.
7. Choose the Agency Appeals Details alternate region.

Case Files

8. In the Agency Received Request field, enter the date on which the agency received the request from the OFO for the case files.
9. In the Case Files Due field, enter the date on which the agency should send the case files to the OFO.
10. In the Case Files Forwarded field, enter the date on which the agency sent the case files to the OFO.

Briefs

11. In the Agency Brief Due field, enter the date on which the agency must send its brief to the OFO.
12. In the Agency Brief Forwarded field, enter the date on which the agency sent the brief to the OFO.
13. In the Agency Received Appellant Brief field, enter the date on which the agency received the brief from the discriminating organization.

Appeal Decision

14. In the Appeal Decision field, enter the date on which the OFO or Merit System Protection Board (MSPB) reached a decision on the appeal.
15. In the Decision field, choose the result that summarizes the decision from the list of

values.

16. In the Agency Received Decision field, enter the date on which agency received the decision.

17. In the Forwarded to Org field, enter the date on which the agency sent the decision to the discriminating organization.

18. Save your work.

    If you are appealing more than one corrective action, choose New Record from the Edit menu, and repeat this procedure to enter information for each corrective action appeal.

Responding to the appeal decision

If as a result of the appeal, the OFO determines that there is no finding, you can conclude the complaint by completing the information in the Closure region. See: Closing a Formal Complaint, page 6-38.

If the OFO determines that further corrective actions are required, you can enter that information in the Corrective Actions region. See Recording Corrective Actions, page 6-53.

If you disagree with the OFO's appeal decision, you can process a Request for Reconsideration (RFR). See Processing a Request for Reconsideration, page 6-51

Collective Agreement Setup

Collective Agreements

A collective agreement is an agreement that defines the terms and conditions of employment for all employees that are covered by its terms. Agreements are typically negotiated and agreed by external bodies such as Trade Unions and Representatives of Employers.

The following sections describe the components you can use to represent the terms of a collective agreement in Oracle HRMS and to apply the correct entitlements to the primary assignments of eligible employees.

Entitlement Items

An entitlement item forms the basis for any entitlement that can be given to an employee as part of a collective agreement. For example, probation period, annual holiday, and car allowance are all entitlement items. For any entitlement you need to provide as part of a collective agreement, you must create an entitlement item.

You can create two types of entitlement item. These are:

- An entitlement item that produces a value that is written to an employee's record.
- An entitlement item that produces a value that is not written to an employee's record, but is held as part of the collective agreement results for that person. You could set up other areas of the application to reference this information if required.

  For example, you could set up an item type called Paternity Leave Allowed that indicated whether an employee is eligible to take paternity leave. This would not be written to the employee's record, but could be seen in the collective agreement results for that person.

Eligibility Profiles

Use eligibility profiles to define the criteria that an employee must meet in order to receive a particular entitlement. The criteria that you can include in an eligibility profile are grouped into five factors:

- Personal Factors
- Employment Factors
- Derived Factors
- Related Coverages

- Other Factors

Each factor contains a variety of criteria from which you select one or more criteria values.

For example, if a collective agreement states that people working in California should receive an extra allowance, you could define an eligibility profile using the Employment Factor criteria of Work Location. The value for the Work Location criterion would be California, (You need to define this work location using the Locations window). A person must meet this criterion in order to be given the associated allowance.

Eligibility profiles can be used in benefits plans, collective agreements, or both. The information you can enter against a profile differs slightly depending on whether you have accessed this window from the total compensation or collective agreements area of the application.

In addition to the eligibility profiles you define, there is a Default profile that you can select when defining entitlement values. You can use this to define a value to apply to everyone not eligible to receive something more beneficial.

Derived Factors

As part of the criteria for an eligibility profile you can set up derived factors. These are eligibility factors that are calculated by the application and can change over time. See: Derived Factors, *Oracle HRMS Compensation and Benefits Management Guide* for more information.

Collective Agreement Details

For each collective agreement recognized by your enterprise you can record information such as a name, number, and whether it is active. You can also indicate the parties by whom it has been agreed. You set these parties up using the organization classifications Employer and Bargaining Association.

Collective Agreement Entitlement Values

For each entitlement item to be included in a collective agreement you must select which eligibility profiles to use, and enter the values that employees who satisfy the criteria receive.

For some example setups of entitlements see: Example Entitlement Setups, page 6-64

Evaluation and Application of Collective Agreement Entitlement Values

To indicate which people are covered by the terms of a collective agreement you select the agreement as part of their primary assignment.

Note: You can select collective agreements as part of other assignments,

but the evaluate and apply processes only calculate values for the primary assignment.

Once this has been done the application has to calculate what values the employee is eligible for and apply them to their record. How this is done depends on the settings of the following user profiles:

- HR:Auto Apply Entitlements
- HR:Auto Evaluate Entitlements

If the HR:Auto Evaluate Entitlements profile is set to Yes, then the values that an employee is entitled to are calculated as soon as the collective agreement is saved to their assignment. If it is set to No then you must run the evaluation process manually from the Collective Agreement Results window.

Note: If the HR:Auto Evaluate Entitlements profile is set to No, then the apply process will not run automatically, even if the HR:Auto Apply Entitlements is set to Yes

If the HR:Auto Apply Entitlements is set to Yes, then the values calculated for a person during the evaluation process are automatically applied to an employee's record. For any entitlements where the employee is entitled to more than one value but the application cannot determine which is most beneficial to the employee, you have to make a choice manually. If it is set to No you have to select and apply all values manually in the Collective Agreement Results window.

There is also a concurrent process called Collective Agreement Entitlement Evaluation that you can run from the Submit Request window to evaluate and apply an employee's entitlement values.

Value Sets for Collective Agreements

As part of the setup of your collective agreement entitlement items you may need to use value sets in order for your entitlement items to perform correctly.

Item Value Sets

If you are creating an entitlement item that populates one of the fields on the assignment included in the table below you need to select the corresponding item value set. This is so that when the entitlement item is selected in the Collective Agreement Entitlements window the values field displays a drop-down list of valid values.

The following table describes the fields on the assignment and the corresponding item value set:

Item Value Sets

Field	Value Set
Bargaining Unit	CAGR_BARGAINING_UNIT
Employee Category	CAGR_EMPLOYEE_CATEGORY
Employment Category	CAGR_EMPLOYMENT_CATEGORY
Grade	CAGR_GRADES
Job	CAGR_JOBS
Organization	CAGR_ORGANIZATIONS
Payroll	CAGR_PAYROLL
Salary Basis	CAGR_SALARY_BASIS

In addition to these a CAGR_YES_NO value set is provided to be used where the valid value for a field is Yes or No, or the field uses a check box, for example Union Member.

You can also use these supplied value sets as examples to set up your own should you need to. For example, if you want to create a value set to write a value to a descriptive flexfield column, you can define a value set that enforces the same validation that is used by the descriptive flexfield.

Beneficial Rule Value Sets

For entitlement items where the most beneficial value cannot be determined from the value itself, but can be determined from some other value associated with it, you can define a value set to enable the application to do this. An example of this would be grades where you can use the sequence number associated with a grade to determine which is most beneficial. This is presuming that you have set up your grades so that the higher the sequence number, the better the grade.

An example value set, CAGR_BR_GRADE has been supplied for you to use as a template for creating your own value sets.

Setups for Collective Agreement Value Sets

In order for the value set to work correctly with the collective agreement, it must conform to the following rules:

- The item value set name must begin with CAGR_
- The beneficial rule value set name must begin with CAGR_BR
- The value set must be defined with a validation type of Table.
- The value set must return two values, one ID and one value or description.
- The following syntax is to be used if business_group_id is required in the sql. This example is for grades:

  ```
  Where business_group_id =  $PROFILES$.PER_BUSINESS_GROUP_ID AND
  GRADE_ID in ()
  ```

  The important part of this syntax is that the ID column is restricted to a set of values that are inserted within the brackets. If the brackets are not there, the value set will not work.

Example Entitlement Setups

The following give an example setup for each of the categories supported in Oracle HRMS.

Assignment Category Example

Imagine that the notice period for employees is based on their employee category as shown in the following table:

Assignment Category

Employee Category	Notice Period
Default	1 month
Blue Collar	2 months
White Collar	3 months

To represent these collective agreement terms in Oracle HRMS you must complete the following steps:

1. Create an entitlement item called Notice Period and associate it with the Notice Period field.

2. Create two eligibility profiles based on the employment factor of Employee Category. In one select the employee category of Blue Collar and in the other select the employee category of White Collar.

3. Assuming you have already created your collective agreement, select the Notice Period entitlement item in the Collective Agreement Entitlements window and define the values for each of the eligibility profiles. Against White Collar, enter 3, and against Blue Collar, enter 2. Use the Default profile name to define the notice period of one month for all other employees.

Pay Scales Example

Imagine your enterprise uses the salary scale shown in the following table where employees' salary is based on their job and grade:

Pay Scales

Job	Grade	Point	Salary
Manager	M1	1.1	40000
Manager	M1	1.2	45000
Manager	M1	1.3	47500
Manager	M2	2.1	50000
Manager	M2	2.2	55000
Executive	E1	3.1	65000
Executive	E1	3.2	75000

To represent these collective agreement terms in Oracle HRMS you must complete the following steps:

1. Define jobs called Manager and Executive.

2. Define the grades M1, M2 and E2

3. Define a pay scale with points 1.1 through to 3.2.

4. Define a scale rate to associate the correct salary value with each point for the pay scale.

5. Define a grade scale to associate each grade to the correct points.

6. Create an entitlement item called Pay Scale and associate it with the Spinal Point field.

7. Create two eligibility profiles based on the employment factor of Job. In one select the job of Manager and in the other select the job of Executive.

8. Assuming you have already created your collective agreement, select the Pay Scale entitlement item in the Collective Agreement Entitlements window.

For each of the rows in the table you define a row in the Pay Scales tab. For the first row you would select the Manager eligibility profile, the grade M1, and the step 1.1.

Payroll Example

Imagine your enterprise uses the hourly rates shown in the following table where employees' rates are based on their grade:

Payroll

Grade	Standard Hourly Rate	Overtime Hourly Rate
A1	7.50	9.00
A2	8.20	9.90
A3	9.60	11.00

To represent these collective agreement terms in Oracle HRMS you must complete the following steps:

1. Define the grades A1 through to A3

2. Ensure the input values, element links and element entries have been defined for the Basic Salary Rate and Overtime elements.

3. Create two entitlement items, one called Standard Hourly Rate associated with the Basic Salary Rate element, and another called Overtime Hourly Rate associated with the Overtime element.

4. Create three eligibility profiles based on the employment factor of Grade. Select A1 in the first, A2 in the second, and A3 in the third.

5. Assuming you have already created your collective agreement, select the Standard Hourly Rate entitlement item in the Collective Agreement Entitlements window.

For each of the rows in the table you define a row in the values tabbed region. For the first row you would select the A1 Grade eligibility profile and enter the value of 7.50.

6. Select the Overtime Hourly Rate entitlement item in the Collective Agreement Entitlements window.

For each of the rows in the table you define a row in the values tabbed region. For the first row you would select the A1 Grade eligibility profile and enter the value of 9.00.

Setting Up a Collective Agreement

Follow these steps to enter a collective agreement, set up the eligibility criteria for the agreement, and to apply the values defined in the agreement to the eligible employees.

> **Note:** Not all legislations utilise all the collective agreements functionality.

To set up a collective agreement:

1. Define the entitlement items for your agreement.

   See: Defining an Entitlement Item for a Collective Agreement, page 6-67

2. Define the eligibility profiles to be used with your collective agreement.

   See: Defining an Eligibility Profile, page 6-69

3. Create organizations to represent the two parties who have negotiated the agreement if required. Use the Employer and Bargaining Association organization classifications.

   See: Entering Organization Classifications, page 2-33

4. Create the collective agreement.

   See: Entering a Collective Agreement, page 6-78

5. Define the entitlements for your collective agreement.

   See: Defining Collective Agreement Entitlements, page 6-79

6. Assign the collective agreement to all employees who are covered by its terms.

   See: Entering an Assignment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

7. Select and apply the entitlement values to be applied to an employee.

   See: Selecting and Applying Collective Agreement Entitlement Values, page 6-87

Defining an Entitlement Item for a Collective Agreement

You create entitlement items using the Entitlement Item Definition window.

To define an entitlement item to generate values to be written to an employee's record:

1. Enter a name for your entitlement item. This must be unique within the category.

2. Select the category for your entitlement item. The category you select here determines the values you see in the Field Name field. For example, if you select a category of Assignment, you will only be able to select field names that relate to assignments.

   If you select the Payroll category, then you can select an element name, rather than a field, to associate with the entitlement item.

   > **Note:** The category of Absence does not have any field names associated with it in the current release so therefore does not have any effect on current absence processing.

3. If you have selected the Payroll category, then you must select the element to which the entitlement item is associated. For example, if this item is to generate values for a person's salary you should select the Regular Salary element.

   If the element has been defined to allow multiple entries, then you must indicate whether the value calculated using this item should be applied to all entries within the pay period or not. If you do not select this check box and there are multiple entries for the element then the collective agreement apply process will error.

   If there are no element entries for an assignment to which the entitlement item applies, then select the Automatically Create Entries check box. This enables the Collective Agreement Entitlement Evaluation process to create the required element entries while processing and applying collective agreement entitlement results.

   > **Note:** You must select the Automatically Create Entries check box while defining new entitlement items as you cannot update this information for existing entitlement items.

   You must also select an input value for the element. Once an element and input value combination has been associated with an entitlement item, it cannot be used again.

4. If you have selected any other entitlement category then you must select a field name and, if the field you select requires it, a unit of measure. This defines which field in the application will be populated with the value generated by this entitlement item. You can only associate each field with one entitlement item.

Defining a Beneficial Rule

5. Select the rule that defines which value is most beneficial for this entitlement item.

For example, if the item was Holiday Allowance, then the beneficial rule should be Highest. The application will use this rule when an entitlement item produces multiple valid values for an employee.

If it is not possible for you to define a beneficial rule or the application cannot determine what is the most beneficial value then you are required to manually select a value if multiple values are returned.

6. Select an item value set for your entitlement item, if required.

   For information on which entitlement items require item values sets see: Value Sets for Collective Agreements, page 6-62

7. Select a beneficial value set if your entitlement item requires a value set to determine the most beneficial value.

   For information on setting up value sets for collective agreements see: Value Sets for Collective Agreements, page 6-62

8. Save your work.

To define an entitlement item to generate values held in the collective agreement results for an employee:

1. Enter a name for your entitlement item. This must be unique within the category.
2. Select a beneficial rule and value set if required.
3. Select a category and unit of measure for your entitlement item.
4. Save your work.

Defining an Eligibility Profile

You use the Participation Eligibility Profiles window to define an eligibility profile with an effective start date of your choice. Before defining the profile, define any derived factors (such as length of service or compensation level), or your own eligibility criteria, that you plan to use as eligibility criteria.

If you want to create your own criteria to include in the eligibility profile, click User Defined Eligibility Criteria and create new criteria, see: Creating your own Eligibility Criteria., *Oracle HRMS Compensation and Benefits Management Guide* To access these criteria, choose the Other tabbed region, and select User Defined Criteria from the list

You can use eligibility profiles to determine:

- employee eligibility for compensation and benefits plans
- entitlements in collective agreements

- eligibility for grade/step progression
- eligibility for various work schedules, and so on

The information you can enter differs slightly depending on whether you have accessed this window from the Total Compensation or Collective Agreements area of the application.

> **Note:** If you use the Total Compensation Setup Wizard to set up grade ladders, programs and plans, and Total Compensation Statements, you can create or update eligibility profiles while you are working in the Wizard.

To define an eligibility profile:

1. Enter the Name of the eligibility profile you are defining.
2. Enter a Description of this eligibility profile.
3. Select an Assignment Type to which this eligibility profile applies.

   For example, you can define an eligibility profile for employee assignments if this profile is only used for employees.

   > **Note:** You can only select Employee Assignment Only for profiles to be used with collective agreements.

4. Select the profile Status.

   Pending: This eligibility profile is currently proposed, but not active.

   Active: This eligibility profile is in use.

   Inactive: This eligibility profile is in use but cannot be associated with any new programs, plans, or options.

   Closed: This eligibility profile was once Active or Pending, but is no longer in use.

5. Select whether this eligibility profile applies to benefits or collective agreements. If you are defining an eligibility profile for work schedules or grade step progression, then select benefits.
6. Choose the tabbed region that contains a criteria element that you want to include in your eligibility profile. Choose from:
   - Personal
   - Employment

- Derived Factors
- Related Coverages (Not applicable to collective agreements)
- Other

7. Select a criteria element.

   For example, you could choose Person Type as one of several eligibility criteria of the Personal type.

   > **Note:** When you define more than one value for a criterion, at least one of the values must be present in the person's record for them to be eligible. However, when you use multiple criteria in an eligibility profile (for example, a Work Location and an Organization), the person must meet at least one value for *each* criterion.

   If you use a FastFormula eligibility rule as part of your eligibility profile, the participant must meet the criteria of the rule and one value from any other criteria that you include in the eligibility profile. If you use more than one FastFormula rule, by default the participant must meet the criteria of all the rules. If you change the user profile option BEN:Eligible Profile Rule from AND to OR, the participant need only meet the criteria of one rule.

8. Enter a Seq (sequence) number specifying the order the system processes this criteria element relative to any other criteria in this eligibility profile.

   > **Note:** You must assign a sequence number of a higher priority to all criteria that are used to exclude eligibility.

9. Select one or more values for the criteria element you have selected.

10. Check the Exclude field if a person becomes ineligible to participate in the compensation object, or to receive the collective agreement entitlement you associate with this eligibility profile if they meet this criterion.

    You typically check the Exclude field when it is easier or faster to define which persons are excluded from eligibility, as opposed to defining which person are eligible.

11. If you are defining an eligibility profile for a grade ladder, and you want to rank your employees to determine the most eligible person to progress, enter an eligibility Score for this criteria.

    The application calculates the eligibility rank based on the total score for all criteria

that the person satisfies.

12. For grade ladders, you can also enter an eligibility Weight for a criteria.

    The application multiplies the weight by the criteria value. You can only use weights with criteria that contain numeric values. If you enter a score and a weight for a criteria, the application adds the person's score to the weight to arrive at the final number.

13. Repeat steps 6, page 6-70 to 12, page 6-71 for each criteria element that you include in your eligibility profile.

14. Choose the Display All tabbed region to view the criteria elements in this eligibility profile.

15. Save your work.

Defining Derived Factors: Compensation Level

You can define a compensation level factor as part of an eligibility profile (to be used in determining benefits participation or collective agreement entitlements) or a variable rate profile. A compensation level factor can be based on either stated salary, balance type, or benefits balance type.

You define compensation level factors in the Derived Factors window. The values you can select in some of the fields depend on whether you have accessed the Derived Factors window from the Total Compensation or Collective Agreements area of the application.

To define a compensation level factor:

1. Enter a Name for this compensation level factor.

2. Select the Unit Of Measure for this compensation level factor.

3. Select the Source of the compensation level factor.

   - Select the Defined Balance for this compensation level factor if you selected a source of balance type.

   - Select a Benefits Balance Type if you selected a source of benefits balance type.

   - Select the compensation periodicity in the Stated Comp Periodicity field if you selected a source of stated compensation.

     Note: If you have installed the Oracle Incentive Compensation

patch 4409180 you can select either Oracle Incentive Compensation - Amount Earned or Oracle Incentive Compensation - Amount Paid as the source. If you select any of these sources, then the Incentive Compensation Information region displays, where you can enter the Start and End Dates, and select the Prorate if date range differs from OIC range check box

In the Values block:

4. Enter the Minimum amount under which the system does not calculate this compensation level factor.
   - Check the No Minimum field if there is no minimum compensation amount under which the system excludes participants when determining participation eligibility and activity rates.

5. Enter the Maximum amount above which the system does not calculate this compensation level factor.
   - Check the No Maximum Compensation field if there is no maximum compensation amount above which the system excludes participants when determining participation eligibility and activity rates.

6. Select a Determination Code or Rule to define when the system determines a participant's compensation level.

7. Choose a Rounding Code or Rounding Rule to specify the level to which the system rounds the results of this compensation level factor.

8. Save your work.

Defining Derived Factors: Percent of Full Time Employment

A percent full time factor derives an employee's percent of full time employment. The application uses this information to calculate activity rates, coverage amounts, or to determine participation eligibility for either benefits or collective agreement entitlements.

For example, you could define the 100% percent full-time factor to identify those employees who work 100% full-time (40 hours per week) and thus qualify for most benefits or entitlements.

You define percent full time factors in the Derived Factors window. The values you can select in some of the fields depend on whether you have accessed the Derived Factors window from the Total Compensation or Collective Agreements area of the application.

To define a percent full time factor:

1. Enter a Name for this percent full time factor.

2. Check the No Minimum field if there is no minimum percentage of full-time employment under which the application excludes employees when determining participation eligibility and activity rates.

   - Or, enter a Minimum Percent Value to define the minimum percentage of full-time employment to be used in this calculation.

3. Check the No Maximum field if there is no maximum percent of full-time employment beyond which the application excludes employees when determining participation eligibility and activity rates.

   - Or, enter a Maximum Percent Value to define the maximum percent of full-time employment to be used in this calculation.

4. Check the Use Primary Assignment Only field to specify that the application considers only an employee's primary assignment when determining percent of full time employment.

5. Check the Use Sum of All Assignments field to specify that the application considers all active assignments when determining percent of full-time employment.

6. Select a Rounding Code or Rule to specify the level to which the application rounds the results of this calculation.

7. Save your work.

Defining Derived Factors: Hours Worked In Period

An hours worked in period factor derives the number of hours a given employee has worked over a given period of time. The application uses this information to determine participation eligibility for either benefits or collective agreement entitlements, activity rates, and coverage amounts.

You define hours worked in period factors in the Derived Factors window. The values you can select in some of the fields depend on whether you have accessed the Derived Factors window from the Total Compensation or Collective Agreements area of the application.

To define an hours worked in period factor:

1. Enter a Name for this hours worked in period factor.

2. Select the calculation source for this hours worked in period factor in the Source field.

   Balance Type: The application retrieves hours worked information from a balance.

   Benefits Balance Type: The application retrieves hours worked information from a benefits balance.

3. Specify when the application calculates this hours worked in period factor in the Once or Continuing field.

   Once: The application only calculates this hours worked in period factor following a life event or for open enrollment.

   Continuing: The application calculates this hours worked in period factor each time you run the Participation batch process.

4. Select the Defined Balance for this compensation level factor if you selected a calculation source of balance type.

5. Select a Benefits Balance Type if you selected a calculation source of benefits balance type.

6. Check the No Minimum field if there is no minimum number of hours worked in period under which the application excludes employees when determining participation eligibility and activity rates.

   - Or, enter the Minimum hours worked in period under which the application does not calculate this hours worked in period factor.

7. Check the No Maximum field if there is no maximum hours worked in period above which the application excludes employees when determining participation eligibility and activity rates.

   - Or, enter the Maximum hours worked in period beyond which the application does not calculate this hours worked in period factor.

8. Select an hours worked Determination Code or Rule that defines how to calculate the hours worked in period.

9. Select a Rounding Code or Rule to specify the level to which the application rounds the results of this hours worked in period factor.

10. Save your work.

Defining Derived Factors: Age

An age factor derives a person's age in order to determine participation eligibility for either benefits or collective agreement entitlements, activity rates, and coverage

amounts.

For example, you could define the Retire 65 age factor to identify those employees who are at least 65 years of age and thus qualify for a maximum benefit under your corporation's retirement plan. For collective agreements you could define the Age Less Than 21 age factor to identify those employees who are less than 21 and thus should be placed on a particular grade.

You define age factors in the Derived Factors window. The values you can select in some of the fields depend on whether you have accessed the Derived Factors window from the Total Compensation or Collective Agreements area of the application.

To define an age factor:

1. Enter a Name for this age factor.
2. Select the UOM to specify the unit of measure for this age factor.
3. Select an Age to Use code to indicate the kind of person, such as the participant or the participant's child, for whom you are defining a derived age factor.

   Note: Derived factors to be used with collective agreements can only use the employee's age.

4. Select an Age Determination Code or Rule to specify the date the application uses to calculate age.
5. Check the No Minimum Age field if there is no minimum age under which the application excludes employees when determining participation eligibility and activity rates.
   - Or, enter the Minimum age beyond which the application does not calculate this age factor.
6. Check the No Maximum Age field if there is no maximum age beyond which the application excludes employees when determining participation eligibility and activity rates.
   - Or, enter the Maximum age beyond which the application does not calculate this age factor.
7. Select a Rounding Code or Rule to specify the level to which the application rounds the results of this age factor calculation.
8. Save your work.

Defining Derived Factors: Length of Service

A length of service factor derives the length of service for a given worker in order to determine participation eligibility for either benefits or collective agreement entitlements, activity rates, and coverage amounts.

You define length of service factors in the Derived Factors window. The values you can select in some of the fields depend on whether you have accessed the Derived Factors window from the Total Compensation or Collective Agreements area of the application.

To define a length of service factor:

1. Enter a Name for this length of service factor.

2. Select the unit of measure in the UOM field by which you are defining the length of service factor.

3. Select a Determination Code or Rule that defines how the system calculates an employee's length of service.

4. Check the No Minimum Applies field if there is no minimum length of service under which the system excludes employees when determining participation eligibility and activity rates.

   - Or, enter the Minimum length of service under which the system does not calculate this length of service factor.

5. Check the No Maximum Applies field if there is no maximum length of service above which the system excludes employees when determining participation eligibility and activity rates.

   - Or, enter the Maximum length of service beyond which the system does not calculate this length of service factor.

6. Select a length of service Date to Use Code or Rule to specify the date from which the system calculates the employee's length of service.

   Hire Date: The system always uses the employee's hire date as the start date when calculating length of service.

   Adjusted Service Date: The system first uses the employee's adjusted service date if one exists. If there is no adjusted service date, the system uses the employee's hire date.

7. Check the Use Override Service Date field to indicate that the system should override the person's service date when determining eligibility.

Note: You enter the Override Service Date for a person in the Participation Overrides window.

8. Select a Rounding Code or Rule to specify the level to which the system rounds the results of this length of service factor.

9. Save your work.

Defining Derived Factors: Combination Age and Length of Service

A combination age and length of service factor associates two factors you have already defined: an age factor and a length of service factor.

You define combination age and length of service factors in the Derived Factors window. The values you can select in some of the fields depend on whether you have accessed the Derived Factors window from the Total Compensation or Collective Agreements area of the application.

To define a combination age and length of service factor:

1. Enter a Name for the combination age and length of service factor you are defining.

2. Select an Age Factor.

3. Select a Length of Service Factor.

4. Enter the Minimum value for the combination of age and length of service that qualifies a person as eligible for the benefit, collective agreement entitlement, or activity rate with which this factor is associated.

5. Enter the Maximum value for the combination of age and length of service that qualifies a person as eligible for the benefit, collective agreement entitlement, or activity rate with which this factor is associated.

6. Enter an Order Number to specify the order in which the application processes and displays combined age and length of service records.

7. Save your work.

Entering a Collective Agreement

Use the Collective Agreements window to enter information about collective agreements used by your enterprise.

To enter a collective agreement:

1. Enter the name of the collective agreement. This must be unique to allow a collective agreement to be referenced across your business group.

2. Select a status for the collective agreement. Although you can still apply inactive collective agreements to employees, no values are calculated for it until you set it to Active.

3. Enter the number of the collective agreement.

4. Enter the start date of the collective agreement and enter its jurisdiction.

   Note: An end date should only be entered once the collective agreement is no longer applicable to your enterprise. After the end date the collective agreement can no longer be applied to an assignment.

5. Select the employer and bargaining unit who have negotiated the collective agreement. These are defined using the employer classification and bargaining association classification in the Organization window. Enter the name of the signatory for each party.

6. Enter the name of the authorizing body and the date on which the collective agreement was authorized.

7. Save your changes.

What Next?

You can now define the entitlement values for the collective agreement using the entitlement items and eligibility profiles you have created. You do this in the Collective Agreement Entitlements window.

Defining Collective Agreement Entitlements

Use the Collective Agreement Entitlements window to define the values associated with all the entitlement items in your collective agreement. These are the values that employees covered by the terms of the collective agreement receive if they meet the criteria defined by the eligibility profile. Each value is held in an entitlement line.

Note: The Message Level, Range To, Range From, Non-Updateable, From Step, and To Step fields are to be used in future releases and are not currently active.

Example Entitlement Setups

The following give an example setup for each of the categories supported in Oracle HRMS.

Assignment Category Example

Imagine that the notice period for employees is based on their employee category as shown in the following table:

Employee Category	Notice Period
Default	1 month
Blue Collar	2 months
White Collar	3 months

To represent these collective agreement terms in Oracle HRMS you must complete the following steps:

1. Create an entitlement item called Notice Period and associate it with the Notice Period field.
2. Create two eligibility profiles based on the employment factor of Employee Category. In one select the employee category of Blue Collar and in the other select the employee category of White Collar.
3. Assuming you have already created your collective agreement, select the Notice Period entitlement item in the Collective Agreement Entitlements window and define the values for each of the eligibility profiles. Against White Collar, enter 3, and against Blue Collar, enter 2. Use the Default profile name to define the notice period of one month for all other employees.

Pay Scales Example

Imagine your enterprise uses the salary scale shown in the following table where employees' salary is based on their job and grade:

Job	Grade	Point	Salary
Manager	M1	1.1	40000
Manager	M1	1.2	45000
Manager	M1	1.3	47500

Job	Grade	Point	Salary
Manager	M2	2.1	50000
Manager	M2	2.2	55000
Executive	E1	3.1	65000
Executive	E1	3.2	75000

To represent these collective agreement terms in Oracle HRMS you must complete the following steps:

1. Define jobs called Manager and Executive.
2. Define the grades M1, M2 and E2.
3. Define a pay scale with points 1.1 through to 3.2.
4. Define a scale rate to associate the correct salary value with each point for the pay scale.
5. Define a grade scale to associate each grade to the correct points.
6. Create an entitlement item called Pay Scale and associate it with the Spinal Point field.
7. Create two eligibility profiles based on the employment factor of Job. In one select the job of Manager and in the other select the job of Executive.
8. Assuming you have already created your collective agreement, select the Pay Scale entitlement item in the Collective Agreement Entitlements window.

For each of the rows in the table you define a row in the Pay Scales tab. For the first row you would select the Manager eligibility profile, the grade M1, and the step 1.1.

Payroll Example

Imagine your enterprise uses the hourly rates shown in the following table where employees' rates are based on their grade:

Grade	Standard Hourly Rate	Overtime Hourly Rate
A1	7.50	9.00

Grade	Standard Hourly Rate	Overtime Hourly Rate
A2	8.20	9.90
A3	9.60	11.00

To represent these collective agreement terms in Oracle HRMS you must complete the following steps:

1. Define the grades A1 through to A3.
2. Ensure the input values, element links and element entries have been defined for the Basic Salary Rate and Overtime elements.
3. Create two entitlement items, one called Standard Hourly Rate associated with the Basic Salary Rate element, and another called Overtime Hourly Rate associated with the Overtime element.
4. Create three eligibility profiles based on the employment factor of Grade. Select A1 in the first, A2 in the second, and A3 in the third.
5. Assuming you have already created your collective agreement, select the Standard Hourly Rate entitlement item in the Collective Agreement Entitlements window.

   For each of the rows in the table you define a row in the values tabbed region. For the first row you would select the A1 Grade eligibility profile and enter the value of 7.50.
6. Select the Overtime Hourly Rate entitlement item in the Collective Agreement Entitlements window.

   For each of the rows in the table you define a row in the values tabbed region. For the first row you would select the A1 Grade eligibility profile and enter the value of 9.00.

To define entitlements for a collective agreement:

1. Select the category for the entitlement you are creating. Only entitlement items with this category can be selected in the Entitlement region.

   Note: If you are defining entitlements for a payroll item type, then check that the following definitions have been entered:

   - The element and its input values

- The element links
- The element entries for all eligible employees

2. Select the entitlement item for which you want to create values. The remaining fields display the entries defined for the entitlement item in the Collective Agreement Entitlement Items window.

3. If you want to use a formula to calculate the value for this entitlement, then choose the Formula radio button and select the formula. If you want to define criteria to calculate the value, then ensure the Criteria radio button is selected.

Defining Entitlement Lines:

1. Select the eligibility profile for which you want to define a value.

   Note: In addition to the eligibility profiles you have created there is a DEFAULT profile. If you set up a value using this profile, then it is applied to all employees on the collective agreement, unless they are eligible for a more beneficial value.

2. Select whether this value is active. Inactive lines are ignored when calculating collective agreement values for an employee.

3. Do one of the following:

   - If you are entering values for a pay scale, then select the grade, and the step to be applied to employees that satisfy the criteria for this line. The pay scale for the grade is displayed automatically. The grade is used in association with the eligibility profile to determine the eligibility for pay scale entitlement items. To be eligible to be placed on the specified step, an employee must satisfy both the eligibility profile and be on the selected grade.

     For example, if your eligibility profile is Age Less than 21, and you have selected grade SE01, then an employee must be less than 21 and be on grade SE01 to be placed on the step defined by this line.

   - Otherwise, enter the value to be applied to employees that satisfy this eligibility profile.

4. Add further entitlement lines until you have created all the required values for this entitlement, then save your work.

Setting up Collective Agreement Grades

Collective agreement grades enable you to define how an employee is graded or ranked in a collective agreement. A collective agreement grade is defined by a combination of values that you enter using *grade factors*. A grade factor is a user-defined field that you set up as part of the grade structure in the Collective Agreement Grades (CAGR) key flexfield. The grades that you predefine for a collective agreement are known as *reference grades*. To set up collective agreement grades:

To setup collective agreement grades:

1. Set up the Collective Agreement Grades key flexfield to define a grade structure and grade factors.

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

   > **Note:** If you are in Italy, do not set up this flexfield. You must use the predefined IT_CAGR flexfield structure.

2. Enter a collective agreement, page 6-78

3. Enter collective agreement grades, page 6-84. to link a grade structure to a collective agreement, and to define a set of reference grades.

What Next?

You can now define a collective agreement grade for an assignment using the Employment Terms tabbed region on the Assignment form.

See: Entering Additional Assignment Details, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Collective Agreement Grades

You enter collective agreement grades to link a collective agreement to a grade structure and to define a set of reference grades that can be used in that collective agreement.

You enter this information using the Agreement Grades window.

To enter a collective agreement grade:

1. Query the collective agreement and select the grade structure. The reference grades entered will be recorded against the combination of collective agreement and grade structure selected.

2. Check the Override Allowed check box if you want to enable users to enter any

combination of values for the selected grade structure in the Assignment window. If you leave the check box unchecked users will be forced to select a predefined reference grade.

3. Insert a sequence number and click the Name field. Enter values for the grade factors that are displayed. Each combination of values represents a reference grade.

4. Enter as many reference grades as required.

5. Save your changes.

   You can now use the Assignment window to define the assignment's collective agreement grade.

   See: Entering Additional Assignment Details, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Collective Agreement Administration

Collective Agreement Administration

After you set up the collective agreements in your enterprise, you need to evaluate and apply it for your required employees. Oracle HRMS provides you the evaluate and apply processes to enable your employees to receive the entitlements specified in the collective agreement.

To evaluate and apply, you must:

- Indicate the people covered by a collective agreement by selecting the agreement as part of their primary assignment.
- Set the HR:Auto Apply Entitlements and HR:Auto Evaluate Entitlements user profiles to calculate what values the employee is eligible for and apply them to their record.

If you set the HR:Auto Evaluate Entitlements profile to Yes, then the application calculates the values that an employee is entitled to as soon as the collective agreement is saved to their assignment. If you set it to No, then you must run the evaluation process manually from the Collective Agreement Results window.

> **Note:** If you set the HR:Auto Evaluate Entitlements profile to No, then the apply process will not run automatically, even if you set the HR:Auto Apply Entitlements to Yes.

If you set the HR:Auto Apply Entitlements to Yes, then the application applies the values calculated for a person during the evaluation process automatically to the employee's record. For any entitlements where the employee is entitled to more than one value but the application cannot determine which is most beneficial to the employee, you have to make a choice manually. If you set it to No, then you have to select and apply all values manually in the Collective Agreement Results window.

There is also a concurrent process called Collective Agreement Entitlement Evaluation that you can run from the Submit Request window to evaluate and apply an employee's entitlement values.

Administering Retained Rights

Oracle HRMS enables an employee to continue to receive a specific entitlement item after an event makes the employee ineligible for the entitlement item. For example, if by changing the role an employee plays in your enterprise, the employee becomes ineligible for an education allowance, you can define it as a retained right if you still want them to receive it. The employee will continue to receive the allowance for the period you define in this window.

Selecting and Applying Collective Agreement Entitlement Values

How you use the Collective Agreement Results window depends on the settings of the profile options associated with collective agreements:

- **Setup A:** If both HR: Auto Evaluate Entitlements and HR: Auto Apply Entitlements are set to No, then you use the Collective Agreement Results window to evaluate and manually select which of the generated values to apply to the employee.

- **Setup B**: If HR: Auto Evaluate Entitlements is set to Yes, but HR: Auto Apply Entitlements is set to No, then the evaluation is done automatically once a collective agreement is selected for an employee. In this instance, you use the Collective Agreement Results window to manually select which of the generated values to apply to the employee.

  If you set up your application like this you may experience a slight delay when saving an assignment record after selecting a collective agreement.

- **Setup C**: If both profiles are set to Yes, then you use the Collective Agreement Results window to check that the application has applied the correct values, and also to manually select a value where the application cannot determine which is the most beneficial for the employee.

  If you set up your application like this you may experience a delay when saving an assignment record after selecting a collective agreement.

  > **Warning:** Ensure that you have set up your collective agreement and associated information correctly before using this setup. Oracle recommends applying values generated by your collective agreements manually until you are sure that your setup works correctly.

The following procedures describe the behavior of the application following the selection of a collective agreement for the first time.

To select and apply entitlement values for setups A and B:

1. If your setup corresponds to Setup A, then in the Collective Agreement Results window, choose the Refresh Entitlements button. The Collective Agreement Evaluation process is run and the results are displayed.

   If your setup corresponds to Setup B, then this evaluation will have been done automatically once you saved the collective agreement against the employee.

2. Choose the View Log button to look at the log file and ensure that the evaluation process has run correctly.

3. Use the category field to limit the entitlement items displayed in the Name fields by category if required. The results for the selected item are shown in the Entitlement Results region.

4. Choose which value to apply to the employee for each item by checking the Chosen check box. You must still check the Chosen check box even if only one value is displayed.

   Where no values are displayed for an item then the employee is not eligible for that item.

   Where the application has been able to calculate which of the values for an item is most beneficial to the employee, the Suggested check box is checked to show this. You must still check the Chosen check box for these values in order for them to be applied to the employee.

   Any values that are included because they are retained rights are shown by a check in the Retained check box.

5. Save your work once you have chosen the value you want to apply to the employee for a particular item.

6. Repeat steps 3 to 5 until you have chosen values for all the entitlement items for which the employee is eligible.

7. Choose the Apply button to apply the values to the employee's record.

8. Choose the View Log button to look at the log and ensure that the values have been applied successfully. Any errors or warnings are shown in the Apply Process Log section.

   Note: Every time you run the Apply process, a new Apply Process Log section is added to the end of the log, so ensure you are looking at the correct section.

9. Close the Collective Agreement Results window and requery the assignment in the Assignment window. The values applied from the collective agreement are displayed.

To select and apply entitlement values for setup C:

1. Choose the View Log button in the Collective Agreement Results window to look at the log file and ensure that the evaluation and apply processes have been run correctly.

2. Do one of the following to identify for which of the entitlement items the application has not been able to determine the most beneficial value for the

employee:

- Look through the log and check that the entry for each entitlement item that satisfies more than one eligibility profile contains the line **Beneficial value is:** You will have to choose a value manually for each of those that do not.

- Navigate through the entitlement items in the Name fields. You will need to choose a value manually for each entitlement item that does not have the Suggested check box checked for one of its values.

3. Choose which value to apply to the employee for each item that has not been processed automatically by checking the Chosen check box. You must still check the Chosen check box even if only one value is displayed.

   Note: If you want to override any of the values the application has applied, then you can still check the Chosen check box for items that have a suggested value.

4. Once you have chosen all the required values, then choose the Apply button to apply the values to the employee's record.

5. Choose the View Log button to look at the log and ensure that the values have been applied successfully. Any errors or warnings are shown in the Apply Process Log section.

   Note: Every time you run the Apply process, a new Apply Process Log section is added to the end of the log, so ensure you are looking at the correct section.

6. Close the Collective Agreement Results window and requery the assignment in the Assignment window. The values applied from the collective agreement are displayed.

What Next?

If you make any changes to a person's employment record that may impact their entitlements, or you make changes to a collective agreement that may impact the entitlements of the employees covered by its terms, you must do one of the following:

- Use the Collective Agreement Entitlement Evaluation process to re-evaluate and reapply the required values to each affected employee:

  See: Running the Collective Agreement Entitlement Evaluation Process, page 6-90

- Use the Collective Agreements Results window to re-evaluate and reapply the required values for each employee effected. Choose the Refresh Entitlements button

to re-evaluate the entitlements the employee should receive and proceed as described in the procedure for setups A and B above.

Defining Retained Rights

Use the Collective Agreement Retained Rights window to define rights that an employee can still receive, even if they are no longer eligible for them. For example, if by transferring from a location an employee becomes ineligible for a location allowance, you can define it as a retained right if you still want them to receive it. The employee will continue to receive the allowance for the period you define in this window.

To define a retained right:

1. Use the Category and Name fields to select the entitlement item that you want to retain for the employee.

2. Check the Retained check box for the value you want to retain.

3. Check the Freeze check box if you want to freeze the value of the entitlement. This means that even if the value of the entitlement item changes in the future due to a change in the collective agreement, the employee will still receive the value as it is now.

   For example, if an employee receives a retained location allowance of $2000 that is frozen, even if the terms of the collective agreement increase the location allowance to $3000, then employee still receives $2000.

4. Enter the date from which the entitlement item is retained, and if required, enter the date when the item is no longer retained.

5. Save your work.

Running the Collective Agreement Entitlement Evaluation Process

The Collective Agreement Entitlement Evaluation process enables you to evaluate and apply collective agreement entitlements for an employee using the Submit Request window.

To run the Collective Agreement Entitlement Evaluation process:

1. Select the Collective Agreement Entitlement Evaluation process in the name field.

2. Click in the Parameters field to display the Parameters window, if it does not automatically open.

3. Select the date on which you want to run the process. This defaults to the system

date.

4. Select the process mode. The options are:

   - **Evaluate Only:** Only the evaluation of possible results is performed.

   - **Evaluate and Apply:** Evaluate the possible results and apply them to the employee's record.

   - **Apply Only:** Apply the results already generated by the previous evaluation.

5. Select the processing level. The options are:

   - **Single Assignment:** Run the process for a single person.

   - **Single Collective Agreement:** Run the process for all people on a single collective agreement.

   - **Single Entitlement:** Run the process for a single entitlement item across all collective agreements.

6. Select the validation mode. The options are:

   - **No Commit - Database Not Updated:** The selected process runs and produces a log file indicating any errors that have occurred but does not save any information on the database. This enables you to run the Apply process without actually applying the results to your employee's record. This means you can correct any problems that may occur prior to amending any values.

   - **Commit - Database Updated:** The selected process runs and saves the information on the database.

7. Do one of the following:

   - If you have selected a processing level of Single Assignment, then select the person for whom you want to run the process.

   - If you have selected a processing level of Single Collective Agreement, then select the agreement for which you want to run the process.

   - If you have selected a processing level of Single Entitlement, then select the entitlement item for which you want to run the process.

   Any changes that are made as a result of this process are made to the person's primary assignment.

8. Choose OK to return to the Submit Request window and choose Submit to run the report. You can view the log file generated from the Requests window. Use this file

to identify any problems that have occurred during the running of the process.

Occupational Health

Occupational Health: Medical Assessments, Disabilities and Work Incidents

Oracle HRMS enables you to record medical assessments, disability information, and work incidents for the people in your enterprise. It also enables you to link this information together. For example, if a medical assessment is required as the result of a work accident, and that assessment then diagnoses a disability in the person, you could relate these records to one another.

> **Note:** The Medical assessments, disabilities and work incidents functionality may not be used by your localization.

Medical Assessments

The Medical Assessment window enables you to enter information about the medical assessments (consultations) provided to the people in your enterprise. For example, you can record:

- When the assessment took place, and the organization and person who performed it.
- The result of the assessment, for example, if a disability was identified.
- If the purpose of the assessment is to evaluate a particular disability, whether the person is considered fit for work.
- Any work incident that was the reason for this assessment.

A person can have multiple medical assessment records. For example, a person may have a recruitment medical and several annual medicals.

Disabilities

Using the datetracked Disabilities window, you can enter information about a person's disabilities. For example, you can record:

- The nature and severity of the disability
- The full-time equivalent that this person represents towards your enterprise's quota of disabled employees
- The details of the registration of this disability with an official organization

- Any work incident that was the cause of this disability
- The medical assessment that first identified this disability.

A person can have multiple disability records. Each disability can be linked to one work incident and to one medical assessment that diagnosed (or identified) the condition. Once a disability has been diagnosed and recorded, you can link it to multiple assessments that evaluate the disability.

Work Incidents

Oracle HRMS enables you to record work incidents, for example, accidents, that involve the people in your enterprise. Work incidents are incidents that occur:

- at work
- on the way to or from work
- in other circumstances that are defined as work-related by your enterprise.

Using the Work Incidents window, you can record:

- The details of the incident, for example, when and where it occurred.
- The health and safety official and/or representative body that were notified of the incident
- Medical details, such as any injury occurred, treatment given, and medical organizations involved
- Whether any compensation was paid
- Whether this person was absent as a result of the incident
- The job the person was doing when the incident occurred

A person can have multiple work incident records.

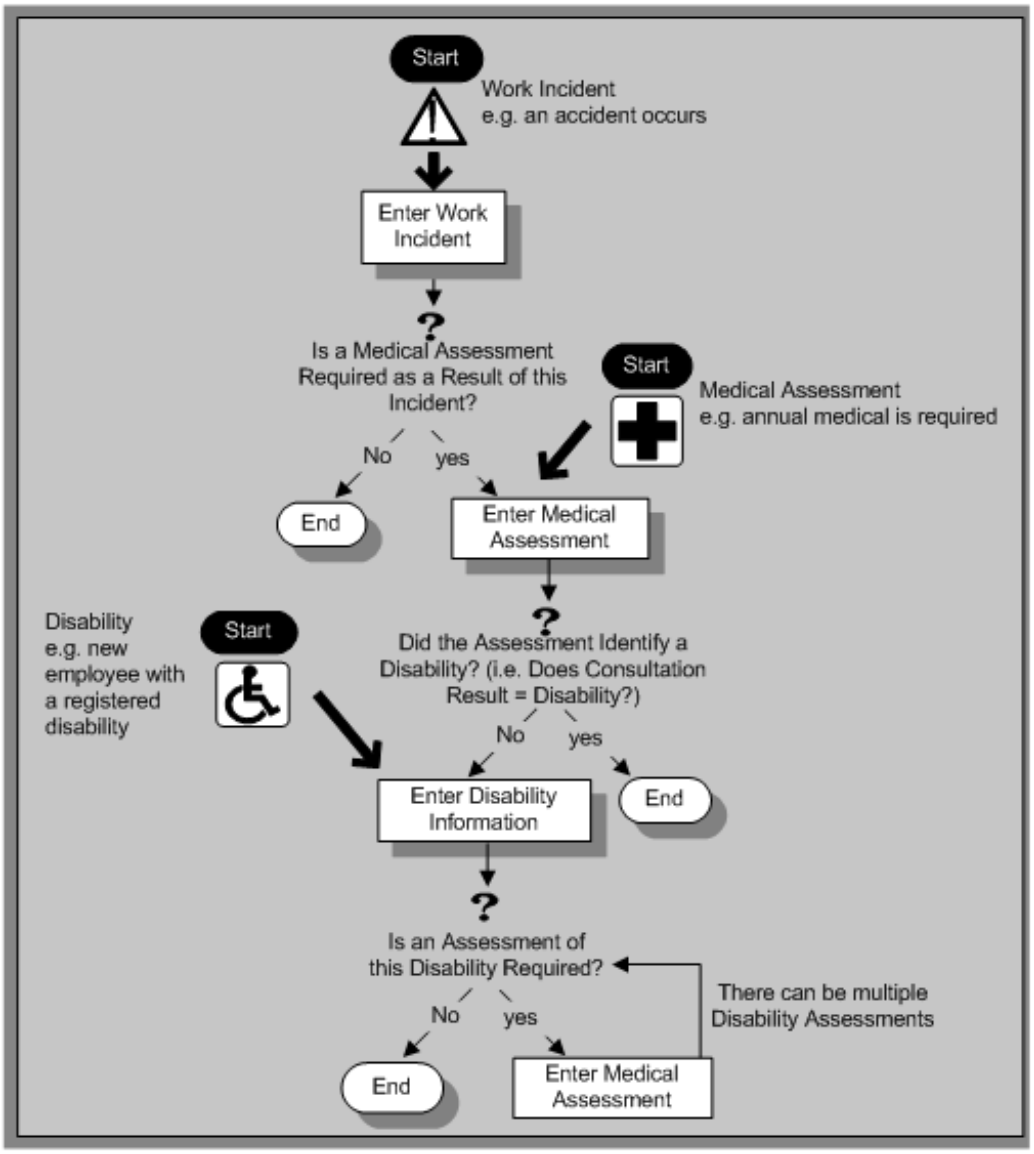
The graphic illustrates the relationship between the medical assessment, disability and work incident tasks. It shows the full process that you could follow if you wanted to record:

- A work incident that occurred
- The medical assessment that was required as a result of the work incident
- The disability record that was required as a result of a "Disability" result in the medical assessment

- The subsequent "Disability type" medical assessments that were required to evaluate the disability on a regular basis

The "Start" boxes show the points at which you can start the process, depending on the task you need to perform.

Recording a Disability



Entering Work Incident Information

You use the Work Incidents window to enter information about the work incident in which a person was involved.

To enter work incident information:

1. Enter information about the incident:

- Enter a unique reference number for this incident.
- Enter the date on which the incident occurred.
- If the incident occurred over time, enter the date on which the incident was identified or reported.
- Select the type of incident that occurred.
- Enter the time at which the incident occurred, if known.
- Check the check box if the incident occurred over a period of time. For example, check this box if the incident was a gas leak.
- Select the circumstances of the incident in the Activity field. For example, you can specify if the incident occurred en route to work.

  For Russian users only: Activity is not required in Russia, so this field is not available to Russian users. Select the primary and secondary reasons for the incident. For example, you can select violation of industrial discipline as the primary reason and extreme temperatures as the secondary reason.
- Enter the date on which the incident was reported.
- Enter the reference number for a related work incident. The list is limited to incidents that involved this person and that occurred on or before the date of this incident.

Incident Description:

1. Choose the Incident Description tab.
2. Enter more detail about the incident:
   - Select the main cause of the incident in the Hazard field.
   - Enter the location of this incident, for example, if the incident occurred in the workplace, identify the room and building.
   - Enter a further description of the incident, if required.

Incident Reporting:

1. Choose the Incident Reporting tab.
2. Enter the reporting details:

- Select the name of the person who reported this incident. You can only select a person who is on the system and who is in the same Business Group.
- Select the method used to report this incident, for example, a voicemail.
- Enter the date and time when the incident was reported. This cannot be earlier than the date and time recorded for the incident.

  Note: You must select the name of the person who reported this incident before you can enter the date and time.

- Enter the organization to whom the incident was reported, for example, the local fire station or police.
- Enter contact details for anyone who witnessed the incident.

  Note: For Russian users: The Incident Reporting tab is not applicable.

Official Notifications:

1. Choose the Official Notifications tab.
2. Enter the official notification details:
   - Select the name of your organization's health and safety representative and enter the date on which they were notified of the incident
   - Describe any remedial action that was taken (or is planned) as a result of this incident.
   - Select the organization and person that are the representative body for this person and enter the date on which they were notified of the incident

     Note: You must select the representative body organization before you can enter the person and reporting date.

See: Entering Representative Body Information, page 2-54

Medical Details:

1. Choose the Medical Details tab.
2. Enter any medical details:

- Select the type of injury and/or disease caused by the incident.
- Enter any further description of the injury or disease.
- Check the box if the person received medical attention as a result of this incident. Then enter the name of the physician and/or the contact details for the hospital that was consulted or that provided treatment.

  Note: If treatment was provided by an internal organization or person, for example, an occupational health organization or a first-aid officer, enter the details into the Hospital Details field.

  Note: For Russian users: The Medical Details tab is not applicable.

Other Information:

1. Choose the Other tab.
2. Enter other information about this incident:
   - If compensation was awarded for this incident, enter the amount. Then select the currency for the compensation amount. The Business Group's currency is shown as the default.

     Note: If you enter a compensation amount, the Currency field cannot be left blank.

   - Enter the date on which the compensation was given.
   - Enter the job the person was doing at the time of the incident. The list is limited to jobs with effective start dates before the incident and effective end dates, if any, after the incident.
   - Enter the time the worker began work on the day of the incident.

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

   Note: If the person was involved in this incident prior to joining your enterprise, leave the Job field blank.

   - Check the Resulted in Absence? check box if the person was absent from work as a result of this incident.

3. Enter further information about this work incident in the Further Information field if it has been set up by your Oracle localization team.

   For Russian users only, see: Entering Work Incident Information, page 6-96

   For Mexican users only: Select the type of risk from the available list-of-values.

4. Save your changes.

What Next?

If a medical assessment is required as a result of this incident, you can choose the Medical Assessment button to open the Medical Assessment window and to enter the details of the assessment. If you enter a medical assessment in this way, its type is Occupational Assessment and it is automatically linked to this incident.

Entering Medical Assessments

Use the Medical Assessments window to record information about the medical examinations performed for the people in your enterprise.

To enter a medical assessment:

1. Enter the date on which the medical assessment was held.

2. Select the type of assessment, for example, Annual Medical Assessment.

   - If you opened the Medical Assessment window via the Disability window, the assessment type is Disability and cannot be changed.

   - If you opened the Medical Assessment window via the Work Incidents window, the assessment type is Occupational Assessment and cannot be changed.

3. Select the result of the assessment.

   Note: If the assessment type is Disability Assessment, you can only select Unfit for Work or Fit for Work. You cannot select a Disability result for a Disability Assessment.

4. Select the name of the examiner and the name of the organization that performed the assessment.

   If the organization is not listed, create the organization and select the Medical Service Provider classification.

   See: Entering Organizations, *Oracle HRMS Enterprise and Workforce Management Guide* and Entering Organization Classifications, page 2-33.

5. Enter the date on which the next assessment is planned.

6. Select the work incident to which this assessment is related, if any. After you choose an incident, the date on which it occurred is automatically displayed.

   You can only link an assessment to an incident if the assessment type is Occupational Assessment.

   > **Note:** If you have saved the assessment date, the list of incidents is limited to those that occurred before the assessment date. Otherwise, all incidents for that person are listed.

   To enter a work incident for this person, see Entering Work Incidents, page 6-96.

7. Enter a description of the assessment.

8. Enter further details in the Further Information field if it has been set up by your Oracle localization team.

9. Save your work.

What Next?

If, as a result of this assessment, a disability was identified, you can enter the details of that disability and link it to this assessment.

See: Entering Disability Information, page 6-101

> **Note:** Once a medical assessment is referenced in a disability record, you cannot change its result from Disability.

Entering Disability Information

HRMS enables you to enter detailed disability information for the people in your enterprise.

You use the Disability window to enter this information.

> **Note:** If you want to record that a person is registered as disabled, but you do not need to hold information about that disability, you can just check the Registered Disabled check box on the Personal tab in the Person window.

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

To enter disability information:

1. Set your effective date early enough to handle any historical disability information that you want to enter.

   Note: If you want to associate this disability record with an existing medical assessment or work incident, your current effective date must be later than the assessment and incident dates. Ask your system administrator to enable the Work Incidents and Medical Assessments windows if they are not available.

2. Select the category of disability, for example, Severely Disabled.

3. Enter into the FTE field the full-time equivalent that this person represents towards your enterprise's quota of disabled employees. If no quota scheme exists, then leave the default value as 1.00.

   Note: You can enter a number that is greater than 1.00, depending on the level of disability.

   The actual figure will normally be provided by the official disability organization.

4. Select the status of this disability information.

   - Active: This information will be included in reports. You cannot enter an Active status if the record has an end date.
   - Inactive: This information will not be included in reports.
   - Pending: This information is not yet complete because you entered it before you entered the medical assessment confirming this disability (where the consultation result was Disability.)
   - Closed: This information has an end date because the person no longer has this disability.

   For Russian users only: Disability status is not applicable in Russia, so the Status field is not available to Russian users. Instead, select the type of disability. You can find this information in the disability certificate provided by the Office of Medical Examination. The application uses this information to calculate any tax benefits and deductions for the employee.

5. Select the reason for the disability, for example, Occupational Incident. If the disability was diagnosed as the result of a medical assessment, select Occupational Assessment.

6. Enter the percentage of disability as determined by the official assessment of this disability.

   For Hungarian and Spanish users only: The degree of disability depends on the category of disability. For example, if the person's disability category states that the disability decreases the work capacity by 50%, enter 50 as the percentage.

7. Select the incident that is related to, or caused, this disability. The list of incidents is limited to incidents that occurred before the current effective date of this disability. When you select an incident, its date is displayed automatically.

8. Select the medical assessment that recorded this disability.

   The list of assessments is limited to assessments that:

   - have a result of Disability
   - have a consultation date that is earlier than the current effective date of the disability
   - are not already linked to a disability record for this person
   - were linked to any incident that you selected in the previous step

   To link an incident to an assessment, see: Entering Medical Assessments, page 6-100

   This field is not datetracked.

Entering Disability Registration Information:

1. Choose the Registration tabbed region to enter the disability registration details.

2. Enter into the ID field the registration number assigned by the disability organization.

3. Select the name of the official disability organization with whom the person's disability is registered.

   You create disability organizations in the Organization window, selecting the Disability Organization classification.

   See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Enter the date on which the employee was registered as disabled with the disability organization and the date on which this registration expires.

Entering Additional Disability Information:

1. Choose the Other tabbed region to enter additional details about this disability.

2. Enter a description of the disability.

   For Russian users only: Disability description is not applicable in Russia. Instead, enter the job conditions under which the disabled employee can work. You can find this information in the disability certificate provided by the Office of Medical Examination. You can use this information to identify suitable assignments for the disabled employee.

3. Enter information about the work restrictions that the employee is subject to as a result of their disability.

4. Enter further information about this disability if the Further Information field has been set up by your Oracle localization team.

   For Hungarian users only: Record if the employee is blind. The application uses this information to calculate any additional holiday or tax benefit for the employee.

   For Indian users only: Indicate if the employee has provided proof of disability, for claiming disability benefits.

   For Mexican users only: Specify the following:

   - Disability ID of any related disabilities

     The list-of-values displays all previous disabilities for your employee.

   - Number of disability days subsidized by the social security agencies

   - Type of disability

     Valid values are:

     - General Disease
     - Maternity
     - Risk Incident

   - Result of the disability

     The Consequence field provides the following options:

     - None
     - Temporary Disability
     - Provisional Initial Assessment
     - Definitive Initial Assessment
     - Death

- Relapse
- Assessment after start date
- Provisional re-assessment
- Relapse without medical discharge
- Definitive re-assessment

- Disability control

For Spanish users only: Record if the employee or dependent contact has a condition with reduced mobility. This information affects the employee's tax withholding rate.

For UAE users only: Indicate if the employee's disability will impact their social insurance contribution. Only one disability can be considered for calculating the social insurance contribution.

5. Save your work.

What Next?

To set up an assessment to evaluate this disability, choose the Medical Asse. (Assessment) button.

See: Entering a Medical Assessment, page 6-100 for more information.

Maintaining Disability Information

You can make changes to the disability information that you saved previously, but if your disability record includes either incident or medical assessment information, you cannot change or delete this information once you have saved it.

Reporting Categories and Statuses

Reporting Categories and Statuses

Some reports place no restrictions on the employment category or assignment status of the employees to be included. However, other reports, such as VETS-100 and ADA, must include only *non-temporary*, *full-time* or *part-time* employees with a *non-terminated* assignment status.

To identify these employees, you register for the business group as *Reporting Categories* those employment categories that include non-temporary, full-time or part-time employees. You register as *Reporting Statuses* those assignment statuses that include non-terminated employees.

Registration of Reporting Categories and Statuses

You must limit the coverage of VETS-100 and ADA reports to employees who work either full or part time but are not temporary workers, and who have a non-terminated employment status as of the end date of the reporting period.

To establish the employment categories and assignment statuses of the employees that VETS-100 and ADA reporting must cover, you register Reporting Categories and Reporting Statuses for the Business Group:

- Reporting Categories are the employment categories including employees who work full or part time on a non-temporary basis.
- Reporting Statuses are the assignment statuses applicable to employees at a non-terminated status.

Start the registration of Reporting Categories and Statuses from the Organization window.

Registering Reporting Categories

Reporting Categories are employment categories that cover non-temporary, full-time, or part-time work. The categories you select here control which employees appear in the EEO-1 and VETs report.

To register reporting categories for the Business Group:

1. In the Organization window, query the Business Group if it does not already appear there. With the cursor on Business Group in the Organization Classification region, choose the Others button. Select Reporting Categories.

2. Click in the first blank field in the Additional Information window to open the Reporting Categories window. Select an employment category to register employees who are non-temporary, full time or part time workers. Choose OK to transfer your selection to the Additional Information window.

3. To register another employment category, repeat step one.

4. When you finish registering categories, save your work. Choose OK to close the Reporting Categories window and the Additional Information window.

Registering Reporting Statuses

Reporting Statuses are those assignment statuses that cover non-terminated statuses. The statuses you select here control which employees appear in the EEO-1 and VETs reports.

To register reporting statuses for the Business Group:

1. In the Organization window, query the Business Group if it does not already appear there. With the cursor on Business Group in the Organization Classification region, choose the Others button. Select Reporting Statuses.

2. Click in the first blank field in the Additional Information window to open the Reporting Statuses window. Register a status that covers employees at a non-terminated status. Choose OK to transfer your selection to the Additional Information window.

3. To register another assignment status, repeat step one.

4. When you finish registering statuses, save your work. Choose OK to close the Reporting Statuses window and the Additional Information window.

OSHA Reporting Setup

Reporting Organizations

You often must issue separate reporting for each GRE in your Business Group. Sometimes you must further break down data for a GRE by the *establishments* (hiring locations, units, or work sites) where its employees are based. A GRE can include employees working in several different establishments, and conversely, a given establishment can include employees in several different GREs.

For reporting purposes, an establishment may be a single physical location, a complex of work sites in a locality, or even all the sites included in a relatively large geographic area. For OSHA reporting, there may be two or more separate establishments at one physical work location if distinctly different types of operations are carried out at the location. To represent establishments for reporting, you give organizations the classification *Reporting Establishment.*

A GRE whose employees all work at the same establishment is simultaneously a GRE and a Reporting Establishment. For GREs with employees at different establishments you define a number of separate Reporting Establishments. To identify the establishment serving as the headquarters organization, you give a Reporting Establishment the additional classification of *Corporate Headquarters.*

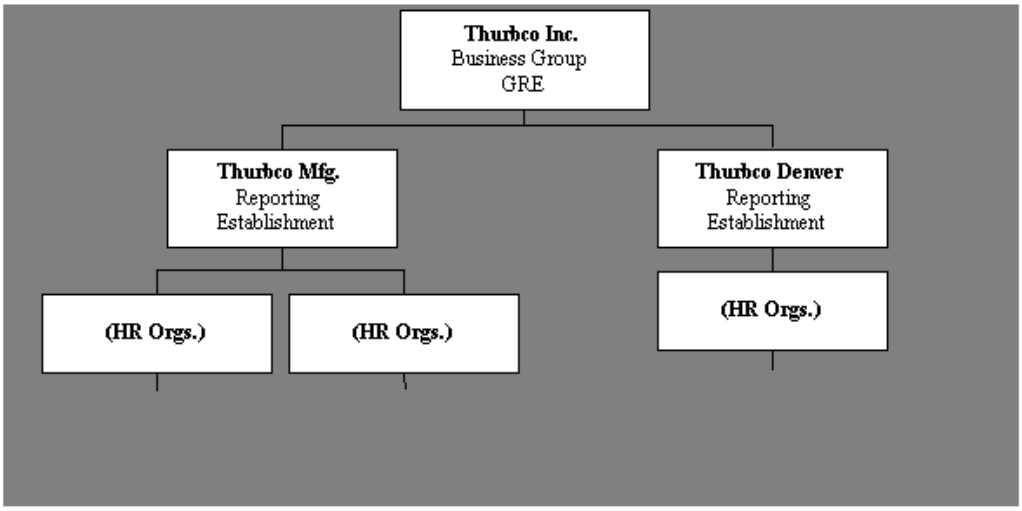
AAP reporting requires breakdowns of employees by the affirmative action plans covering them, instead of breakdowns by establishment. To meet this requirement, you give organizations the classification *AAP Organization,* to represent individual affirmative action plans.

Establishment Hierarchies

To determine for reporting purposes which employees belong to a particular GRE and reporting organization, you construct *establishment hierarchies,* and supply them as parameters to the processes that produce particular reports.

A typical establishment hierarchy has a GRE at the top, Reporting Establishments at the next level, and HR Organizations subordinate to the Reporting Establishments. Report processes normally count employees as belonging to the Reporting Establishment to which their HR Organizations are subordinate in an establishment hierarchy.

Example Establishment Hierarchy



Looking at the example establishment hierarchy above, a report process with this hierarchy as a parameter counts the employees in the HR Organizations subordinate to the Thurbco Mfg. Reporting Establishment as based at that establishment, and those in HR Organizations subordinate to Thurbco Denver as based at that establishment.

Establishment Overrides

Report processes using establishment hierarchies can take exceptional cases into account. You can enter an override Reporting Establishment for any employee. When a process finds an override, it counts the employee as part of the override Reporting Establishment.

For example, if reports should include an employee in the count for Thurbco Denver, even though he is currently assigned to an organization subordinate to Thurbco Mfg, you simply enter Thurbco Denver as his override establishment.

> **Note:** The establishment override functionality does not apply to AAP reporting. This is because the fundamental units of AAP reporting are affirmative action plans, not Reporting Establishments.

Varieties of Establishment Hierarchies

For most government-mandated HR reporting, you set up for a given GRE either a *single-establishment hierarchy*, or *multiple-establishment hierarchies*. If you have multiple establishments, you may also need a *headquarters hierarchy* for the establishment representing your enterprise headquarters.

The same basic rule applies to all the establishment hierarchies you build (but not to the

AAP hierarchies used for AAP reporting). This rule is:

In a non-AAP establishment hierarchy, an organization classified as a Reporting Establishment can never be subordinate to another organization classified as a Reporting Establishment.

This means that in an establishment hierarchy, a GRE/Reporting Establishment can be the top organization, or Reporting Establishments can be subordinate to a GRE (and optionally to HR Organizations). But a Reporting Establishment cannot be subordinate to another Reporting Establishment.

AAP Establishment Hierarchies

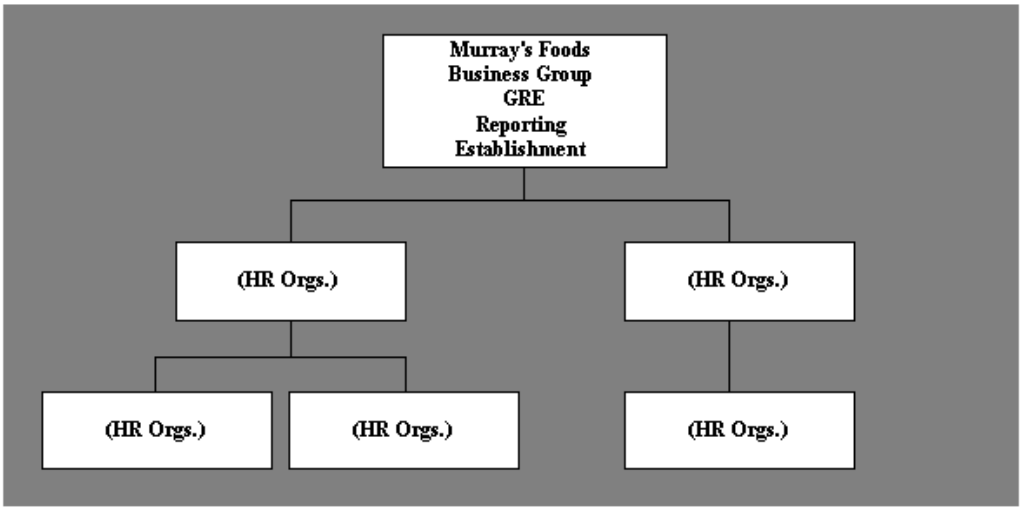
Establishment hierarchies constructed for AAP reporting are exceptional because this reporting is based on the affirmative action plans existing within a GRE. This means that in AAP establishment hierarchies:

- establishments appear as subordinates of AAP Organizations representing the affirmative action plans
- AAP Organizations (which may also be Reporting Establishments) can appear at various levels in the hierarchy, and can be subordinate to other AAP Organizations (which may also be Reporting Establishments).

The Single-Establishment Hierarchy

In some cases, all the employees of a Business Group/GRE or a GRE work at, or from, a single establishment, and you use a *single-establishment hierarchy* as a parameter for production of an establishment report:

Example Single Establishment Hierarchy



The top organization of this type of hierarchy can be either a Business Group/GRE or a GRE, but must also be classified as a Reporting Establishment.

Multi-Establishment Hierarchies

For complex enterprises with multiple GREs and Reporting Establishments, you build *multi-establishment* hierarchies. For certain types of reporting you also require a special *headquarters hierarchy,* to cover the employees working in the Reporting Establishment that constitutes the enterprise headquarters. This section discusses multi-establishment hierarchies; the one following discusses headquarters hierarchies.

The top organization in a multi-establishment hierarchy can be either a Business Group/GRE or a GRE.

> **Note:** For reporting that requires a separate report on your headquarters establishment, the top organization of a multi-establishment hierarchy must *not* be the headquarters organization. A headquarters organization always belongs in a special headquarters hierarchy.

An already existing organization classed as a GRE may be suitable for use as the top organization of a multi-establishment hierarchy. Alternatively, you can create a GRE for reporting purpose only, with a name similar to that of an operational GRE, and the same IRS identification number as the operational GRE.

Counting Establishment Employees

A report process can count of the number of employees in a particular Reporting

Establishment, and alter its treatment of the establishment depending on the results of this count. For example, EEO-1 and VETS-100 reporting for establishments with fewer than 50 employees is different from that for larger establishments.

Looking at the example hierarchy above for MS Distributors, report processes with this hierarchy as a parameter are able to determine that the MS Distributors Detroit Reporting Establishment has fewer than 50 employees, and to produce the appropriate reporting for this establishment.

Preparing for Government-Mandated HR Reporting

In preparation for running the VETS-100 and ADA reports, you must register Reporting Categories and Reporting Statuses for the Business Group.

In preparation for all government-mandated HR reporting, you must set up one or more types of reporting organizations. These include:

- Reporting Establishments
- Corporate Headquarters
- AAP Organizations

After setting up the reporting organizations you need, you can build establishment hierarchies and AAP establishment hierarchies that include these reporting organizations.

Before running EEO-1, VETS-100, ADA, or OSHA reports, you enter establishment overrides for individual employees as necessary.

Setting Up Reporting Organizations

A reporting organization is an organization that has, in addition to any other classifications, one or more of these classifications:

- **Reporting Establishment**
- **Corporate Headquarters**
- **AAP Organization**

Before defining reporting organizations, determine the establishment hierarchies your enterprise needs for government-mandated HR reporting. This will in turn determine the particular reporting organizations you must set up.

See: Varieties of Establishment Hierarchies, page 6-109

Reporting organizations that do not have the classification Corporate Headquarters may be subordinate to other organizations in establishment hierarchies. You can quickly place a subordinate reporting organization in a hierarchy by entering its parent

organization as additional information for its classification.

> **Note:** When a reporting organization is the top organization in an establishment hierarchy, you always place it in the hierarchy when creating the hierarchy in the Organization Hierarchy window.

Example Multi-Establishment Hierarchies

Example Multi-Establishment Hierarchies

For examples of multi-establishment hierarchies, we can look at the hypothetical corporation Swanson Inc. Its Business Group includes two GREs, the parent company Swanson Inc. and a subsidiary, MS Distributors Detroit. The enterprise employs workers at four separate establishments:

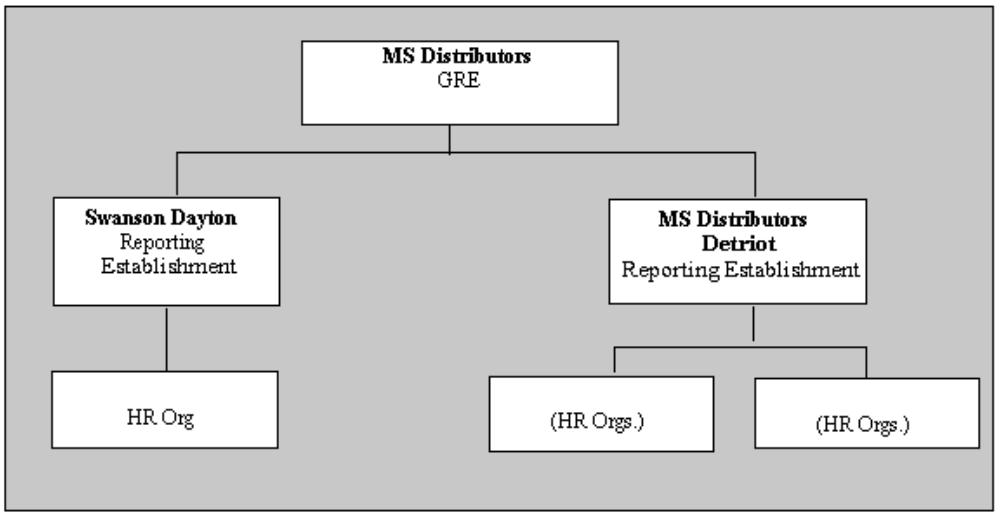
- Company headquarters in Cleveland, Ohio.
- One factory in a Cleveland suburb and another in Dayton, Ohio.
- The MS Distributors warehouse and shipping center in Detroit, Michigan.

This table summarizes the distribution of the 4,000 employees of Swanson Inc., by GRE and Reporting Establishment:

Swanson Inc. Employee Distribution

Reporting Establishment	Swanson Inc. GRE	MS Distributors Detroit GRE
Swanson Inc. Headquarters	500	
Swanson Mfg.	1,500	
MS Distributors Detroit		955
Swanson Dayton	1,000	45

For reporting purposes, this enterprise needs two multi-establishment hierarchies, and requires a headquarters hierarchy. The multi-establishment hierarchies required are these:



When you run a report giving one of these hierarchies as a parameter, the report process includes as belonging in a particular Reporting Establishment, any employees assigned to that establishment, plus all the employees assigned to the HR Organizations subordinate to that establishment. The only employees in these organizations that are not covered are any that have establishment overrides entered for the other Reporting Establishment in the hierarchy.

Setup Steps for OSHA Reporting

To set up OSHA reporting:

1. Ensure that entry of information on each incident of work-related injury or illness is complete.

   See: Entering Information about Work-Related Injury or Illness, page 6-119

2. Identify the establishments within each GRE that you need for OSHA reporting, and ensure that they are defined as Reporting Establishments.

   See: OSHA Data and Reporting, page 6-118 and Setting Up Reporting Establishments, page 6-112

3. Determine and build, if necessary, the establishment hierarchies you need to obtain OSHA reporting.

   See: Setting Up Establishment Hierarchies, page 6-115

4. Manually enter any necessary establishment overrides for employees.

   See: Entering Establishment Overrides, page 6-116

5. Run the OSHA report processes.

   See: Obtaining OSHA Reports, page 6-123

Set Up Establishment Hierarchies

Establishment hierarchies include:

- single-establishment hierarchies
- multi-establishment hierarchies
- headquarters hierarchies
- AAP establishment hierarchies.

Single-Establishment Hierarchies

To create a single-establishment hierarchy:

1. Determine the top organization of the hierarchy. It must be a GRE and a Reporting Establishment. It may be a Business Group/GRE.

2. Build the hierarchy by placing all the HR Organizations in the Business Group/GRE or GRE at the second and lower levels under the top organization.

Multi-Establishment Hierarchies

To create a multi-establishment hierarchy:

1. Determine the top organization of the hierarchy. It can be a Business Group/GRE or a GRE. It cannot be a Reporting Establishment or an HR Organization, and should not have the classification Corporate Headquarters.

2. Build the hierarchy by placing the appropriate establishments and the HR Organizations subordinate to the establishments at lower levels.

Headquarters Hierarchies

To create a headquarters hierarchy:

1. The top organization is that classified as Corporate Headquarters. It must also have the classifications GRE and Reporting Establishment.

2. Build the hierarchy by placing all the HR Organizations in the headquarters organization at the second and lower levels under the top organization.

Placing Subordinate Reporting Organizations in Hierarchies

Reporting organizations with the classification Reporting Establishment and/or AAP Organization may exist in subordinate positions in establishment hierarchies. There is a convenient way to place these organizations in hierarchies when you set them up. You can name the hierarchies and parent organizations of the reporting organization in the Parent Organization window, accessible from the Organization window.

See: Setting Up Establishment Hierarchies, page 6-115

To put a reporting organization in a hierarchy:

1. In the Organization window, query the reporting organization if it does not already appear there. Select Reporting Establishment or AAP Organization in the Organization Classifications region, choose the Others button, and select Parent Organization to open the Parent Organization window.

2. Select the hierarchy name.

3. Select the name of the parent organization to which the reporting organization is subordinate in this hierarchy.

4. To place the reporting organization in another hierarchy, repeat steps 2 and 3.

5. Save your work.

Enter Establishment Overrides

Use establishment overrides when employees who would normally be counted in one Reporting Establishment, should actually be counted as belonging to another in the same establishment hierarchy. Report processes with establishment hierarchies as parameters check whether Reporting Establishment overrides exist for the employees the hierarchies cover. If it finds overrides, it counts the employees as belonging to the override Reporting Establishments.

> **Note:** Because the basic unit of AAP reporting within a GRE is its affirmative action plans (AAP Organizations), not its Reporting Establishments, you cannot enter establishment overrides for AAP reporting.

To enter an establishment override for an employee:

1. Select the override establishment in the Establishment field.

Define Lines of Progression for Jobs

To define a line of progression for a series of jobs, you build entities called *career paths* in Oracle HRMS. Career paths are also useful for Building a line of progression, or career path, involves these two steps:

- entering the name of the line of progression into the system as a career path name, using the Career Path Names window
- entering the jobs comprising the line of progression, starting from the job with highest status and remuneration and working down, using the Map Career Path window.

A job can appear only once in any line of progression.

To define lines of progression:

1. In the Career Path Names window, enter and save the names of the lines of progression you have determined for your enterprise.
2. Open the Map Career Path window. In the Name field, select the top job in a line of progression.
3. In the Career Path Name field, select the name of this line of progression.
4. In the Job Progression From block, select the job that is one level down from the job appearing in the Name field. Check the Down box. The window redisplays with the selected job now appearing in the Name field.
5. Repeat Step 4 until you have entered all the jobs in the line of progression.

   To move back up the line of jobs, check the Up box.
6. Save your work.

OSHA Reporting

OSHA (Occupational Safety and Health Act) Reporting

The Occupational Safety and Health Act of 1970 and Title 29 of the *Code of Federal Regulations,* Part 1904 (29CFR Part 1904) require employers in certain industries to record and report on employees' work-related injuries and illnesses. The Bureau of Labor Statistics (BLS) administers this record keeping and reporting, often in cooperation with state agencies. Employers must consult with these agencies to determine if they are subject to additional state-level recording and reporting obligations.

Employers in relatively high-risk industries such as construction, manufacturing, and health services, must keep OSHA records for each individual establishment on an ongoing basis, if they have a combined total of 11 or more employees working at one or more establishments.

Employers in other industries that normally are not required to keep OSHA records must maintain these records when selected to participate in the Annual Survey of Occupational Injuries and Illnesses. This survey produces national estimates of occupational injuries and illnesses for all employers.

For a full list of industries required to maintain and report on OSHA information, and detailed instructions about OHSA record keeping, consult the document *A Brief Guide to Recordkeeping Requirements for Occupational Injuries and Illnesses.* To obtain copies of this publication, contact your regional office of the Bureau of Labor Statistics or write to:

Bureau of Labor Statistics

Division of Management Systems (1220-0029)

Washington, DC 20212

OSHA Data

Information needed for OSHA reporting includes a description of each work-related injury or illness and the date, place and circumstances of its occurrence or onset, as well as information on its physical effects and its outcome. For a nonfatal incident, you also maintain data showing its effects on the employee's ability to work.

The OSHA 300 Log report and OSHA 300A Summary report record information about work-related injuries and illnesses during the year, and present a summary of these injuries and illnesses at year end. An additional report, OSHA 301 Incident Report, provides further information about the cases you record.

OSHA Establishments

GREs with more than one establishment must maintain separate sets of OSHA records and reporting for each establishment. To represent these establishments and the employees within them, you use Reporting Establishments and establishment hierarchies.

Notice that for OSHA record keeping and reporting, clearly separate activities performed at the same physical location require treatment as separate Reporting Establishments. For example, if an enterprise has manufacturing facilities and sales offices in the same building, each activity constitutes a distinct establishment.

OSHA Categories of Illness

OSHA recognizes these categories of occupational injury or illness:

- Injury: Examples are back strain, bone breaks, and head injury.
- Skin diseases or disorders: Examples are eczema, oil acne, chrome ulcers, and chemical burns.
- Respiratory conditions: Examples are pneumonitis, pharyngitis, rhinitis, acute congestion due to chemicals, dusts, and gases or fumes.
- Poisoning (systemic effects of toxic materials): Examples are poisoning by lead, mercury, cadmium, arsenic or other metals; by carbon monoxide, hydrogen sulfide or other gases; by benzol, carbon tetrachloride or other organic solvents; by insecticide sprays; by other chemicals such as formaldehyde, plastics, and resins.
- All other illnesses: Examples are anthrax, brucellosis, infectious hepatitis, malignant and benign tumors, food poisoning, and histoplasmosis.

Entering Information about Work-related Injury or Illness

When employees suffer work-related injuries or illnesses, you record information about these incidents in the Work Incidents window. You begin this entry from the Person window.

To enter data on an OSHA-reportable incident:

1. In the Person window query the employee suffering the injury or illness, if he or she does not already appear here.
2. Choose the Others button.
3. Select Work Incidents/OSHA.

4. For incidents of work-related injury, you must select the category Injury in the Incident Category field. Otherwise select the category appropriate for a work-related illness.

   See: OSHA Categories of Illness, page 6-119

5. If the employee has an existing incident record related to the new incident you are recording you can select a corresponding reference number in the Related Incident Ref field.

6. Enter the Incident date.

7. Enter the time the incident occurred.

8. If you want the incident to appear on your OSHA reports, choose the OSHA Recordable check box.

Incident Description

1. Choose the Description tab.

2. In the Activity at time of incident field, describe what the employee was doing when injured or taken ill.

3. In the Objects/Substances Involved field, list any tools, equipment, or materials being used or handled.

4. If the incident caused the employee to miss work or restricted the employee's activities, enter the number of days missed or restricted.

   Do not include the day of injury or onset of illness, or days the employee would not have worked in any case. For employees without regular work schedules, estimate the number of missed days.

5. Indicate if the incident caused the termination or permanent transfer of the employee.

6. Select a hazard relative to the injury if appropriate.

7. Enter the location where the incident took place.

8. Enter a brief description of the incident.

9. Enter any additional incident details.

Reporting Information

1. Choose the Reporting tab.

Note: The information recorded in the Reporting tabbed region is not used by the OSHA reports.

2. Enter a report date. The date you enter must be a date on or before the incident date.
3. Enter a report time.
4. Enter brief details of who the incident was reported to.
5. . Briefly detail any witness accounts of the incident.
6. . Enter a name, title, and telephone number for the person responsible for the report.

Official Notifications

1. Choose the Official Notifications tab.

   Note: This tabbed region is optional. The information recorded in this region is not used by the OSHA reports.

2. Select a health and safety representative name.
3. Enter a notification date for the health and safety representative.

   Note: You must enter a health and safety representative name before you can enter the Date Notified field.

4. Briefly describe any remedial action taken as a direct result of the incident.
5. Select the representative body notified of the incident.
6. Select a representative name for the representative body.

   Note: You must enter a representative body before you can enter a representative name.

7. Enter the date that the representative name was notified of the incident.

Note: You must enter a representative name before you can enter a notification date.

Medical Details

1. Choose the Medical Details tab.
2. If the employee was hospitalized as a result of the incident choose the Hospitalized check box.
3. If the employee required emergency treatment as a result of the incident choose the Emergency Room check box.
4. If the employee sustained an injury as a result of the incident select the injury sustained.
5. If the employee contracted a disease as a result of the incident select the disease contracted.
6. In the Body Parts Affected field, enter the injury or illness and the body part, for example, Fracture of ribs; Dermatitis of left hand; Lead poisoning.
7. Enter the name and address of the physician attending the employee, and if he or she was hospitalized, the name and address of the hospital.

Other Important Information

1. Choose the Other tab.
2. Enter the work start time of the employee.
3. If you do not want the employee to be identified on the OSHA reports choose the Privacy Issue check box.
4. If the injury or illness caused the employee's death, you must enter the date of death. Entry of a date in the Date of Death field signals that the injury or illness was fatal, and must be reported as such.
5. Enter compensation details of amount, currency and the date compensation was awarded.
6. Select the employee's job at the time of the incident.

7. If the incident resulted in an absence from work check the Resulted in Absence check box.

8. Save your work.

   When you run the OSHA 300 and OSHA 301 reports, information entered in this window appears on one or both of these reports.

   See: Obtaining OSHA Reports, page 6-123

   Note: The Case Number field populates when you save your work.

Running OSHA Reports

Computer-generated versions of OSHA 300, OSHA 300A, and OSHA 301 are acceptable, so long as they contain the same information and are as readable and comprehensible as the OSHA forms. The BLS advises employers using computer-generated forms to submit a sample report for review, to ensure compliance with BLS regulations.

Run report requests from the Submit Requests window.

See: Setup Steps for OSHA Reporting, page 6-114

To run OSHA 300, 300A or 301 Reports:

1. Select OSHA 300 Log Report, OSHA 300A Summary Report, or OSHA 301 Incident Report in the Request Name field. Click in the Parameters field if the Parameters window does not open automatically.

2. Enter the start and end dates of the period this report covers.

   The period end date is the date that appears on the report.

3. Select the name of the establishment hierarchy to use for the report.

4. Select a location for the report.

5. Select sort orders for the report in the Order by fields.

6. Choose the Submit button to run the report.

Workforce Intelligence for Employment Agreements and Legal Compliance

Compliance (United States Specific) Detail Workbook

This workbook provides US-specific compliance information. It enables you to:

- View OSHA incident details.
- View organization-wide disability information.
- View details of accommodations made for disabilities across the organization.
- View special information associated with people in the organization.

Parameters

This wookbook has no parameters.

Worksheets

This workbook has the following worksheets:

- OSHA Incidents
- Disabilities
- Disability Accommodations
- Detailed Special Information

OSHA Incidents Worksheet

This worksheet enables you to view details associated with recorded OSHA incidents within your organization.

Business Questions

What OSHA incidents have occurred?

Disabilities Worksheet

This worksheet enables you to view special information concerning employees with disabilities within your organization.

Business Questions

Which employees are disabled and in what way?

Disability Accommodations Worksheet

This worksheet enables you to view details about accommodations made for employees with disabilities across your organization.

Business Questions

What accommodations have been for disabled people?

Detailed Special Information Worksheet

This worksheet enables you to view special employee information for employees within your organization. The worksheet includes only current employees.

Business Questions

Show me the special information held against my employees.

Employee Equal Opportunity Exceptions (United States Specific) Detail Workbook

This workbook is provided to aid Ethnic Origin reporting requirements in the United States. It can be used to highlight the exceptions to employee data in your HRMS system that require action before you can produce legislative reports.

Worksheets

This workbook has the following worksheets:

- Employees Outside an Establishment Hierarchy
- Employees Without a Location
- Employees With Missing Equal Opportunity Data

Employees Outside an Establishment Hierarchy Worksheet

The Employees Outside an Establishment Hierarchy worksheet enables you to analyze which employees are at a location that is not in a defined Reporting Establishment Hierarchy, on a given effective date.

Business Questions

Which employees are outside the establishment hierarchy?

Parameters

You must specify a value for the following parameter:

- Effective Date

The report includes employees who have an assignment on the selected effective date.

Employees Without a LocationWorksheet

The Employees Without a Location Worksheet enables you to analyze which employee primary assignments are not assigned a location on a given effective date.

Business Questions

Which employees have no location specified for them?

Parameters

You must specify a value for the following parameter:

- Effective Date

The report includes employees who have an assignment on the selected effective date, and who are not associated with a location.

Employees With Missing Equal Opportunity DataWorksheet

This worksheet enables your organization to discover which employee primary assignments have missing Ethnic Origin information on a given effective date.

For example, the report will show if an employee is missing data for employment category or ethnic origin.

Business Questions

Which employees have missing equal opportunity information?

Parameters

- Establishment Hierarchy
- Top Establishment
- Effective Date

The report includes employees who have a primary assignment within the selected establishment hierarchy on the selected effective date.

Employee Equal Opportunity for New Hires (United States Specific) Detail Workbook

This workbook enables you to list new employee hires within a given period. The workbook output includes the employee primary assignment details, job name, employee number, ethnic origin, hire date, and age at hire date, hired annual salary and current annual salary.

Worksheets

This workbook has the following worksheets:

- By Establishment Hierarchy
- By Organization Hierarchy

By Establishment Hierarchy Worksheet

This worksheet enables you to list employee new hires within a given period. The worksheet output includes the following employee primary assignment details:

- Job Name
- Employee Number
- Ethnic Origin
- Hire Date
- Age at Hire Date
- Hired Annual Salary
- Current Annual Salary

The list of employees is for a given establishment hierarchy.

Business Questions

What are the ethnic origin, gender, and hiredate of my new hires within a given establishment hierarchy?

Parameters

You must specify values for the following parameters:

- Establishment Hierarchy
- Top Establishment
- Start Date
- End Date

The report includes employees who have a primary assignment within the selected establishment hierarchy during the period from the selected Start Date to the selected End Date.

Headings and Calculations

This worksheet uses the following calculations:

- **Age at Hire Date**

  Calculates a persons age at their hire date.

- **Current Annual Salary**

  Calculates the annual salary as of the current date for an assignment.

- **Hired Annual Salary**

  Calculates the annual salary as at the hire date of an assignment.

By Organization Hierarchy Worksheet

This worksheet enables you to list employee new hires within a given period. The worksheet output includes the following employee primary assignment details:

- Job Name
- Employee Number
- Ethnic Origin
- Hire Date
- Age at Hire Date
- Hired Annual Salary
- Current Annual Salary

The list of employees is for a given organization hierarchy.

Business Questions

What are the ethnic origin, gender, and hiredate of my new hires within a given organization hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

The report includes employees who have a primary assignment within the selected organization hierarchy during the period from the selected Start Date to the selected End Date.

Headings and Calculations

This worksheet uses the following calculations:

- **Age at Hire Date**

  Calculates a persons age at their hire date.

- **Current Annual Salary**

  Calculates the annual salary as of the current date for an assignment.

- **Hired Annual Salary**

  Calculates the annual salary as at the hire date of an assignment.

Employee Equal Opportunity for Separations (United States Specific) Detail Workbook

This workbook enables you to report on employee separations within a given period. The workbook output includes the employees' job name, employee number, gender, hire date, separation date, and separation reason.

Worksheets

This workbook has the following worksheets:

- By Establishment Hierarchy
- By Organization Hierarchy

By Establishment Hierarchy Worksheet

This worksheet enables you to report on employee separations within a given period. The worksheet output includes the following employee primary assignment details:

- Job Name
- Employee Number
- Gender
- Hire Date
- Actual Separation Date
- Separation Reason

The list of employees is for a given establishment hierarchy.

Business Questions

What are the ethnic origin, gender, and separation reason of my employees separating from a given establishment hierarchy?

Parameters

You must specify values for the following parameters:

- Establishment Hierarchy
- Top Establishment
- Start Date
- End Date

The report includes employees who have a primary assignment within the selected establishment hierarchy during the period from the selected Start Date to the selected End Date.

By Organization Hierarchy Worksheet

This worksheet enables you to report on employee separations within a given period. The worksheet output includes the following employee primary assignment details:

- Job Name
- Employee Number
- Gender
- Hire Date
- Actual Separation Date
- Separation Reason

The list of employees is for a given organization hierarchy.

Business Questions

What are the ethnic origin, gender, and separation reason of my employees separating from a given organization hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

The report includes employees who have a primary assignment within the selected organization hierarchy during the period from the selected Start Date to the selected End Date.

Employee Equal Opportunity with Salary (United States Specific) Detail Workbook

This workbook enables you to list employee primary assignment details including job name, employee number, gender, ethnic origin, hire date, and salary.

Worksheets

This workbook has the following worksheets:

- By Establishment Hierarchy
- By Organization Hierarchy

By Establishment Hierarchy Worksheet

This worksheet enables your organization to list employee primary assignment details including, Job Name, Employee Number, Gender, Ethnic Origin, Hire date and Salary. The list of employees is for a given Establishment Hierarchy.

Business Questions

What are the ethnic origin, gender, and salary of my employees in a given establishment hierarchy?

Parameters

You must specify values for the following parameters:

- Establishment Hierarchy
- Top Establishment
- Effective Date

The report includes employees who have a primary assignment within the selected establishment hierarchy on the selected Effective Date.

Headings and Calculations

This worksheet uses the following calculations:

- **Annual Salary**

  Calculates a person's annual salary as of the current date.

By Organization Hierarchy Worksheet

This worksheet enables your organization to list employee primary assignment details including, job name, employee number, gender, ethnic origin, hire date, and salary.

The list of employees is for a given organization hierarchy.

Business Questions

What are the ethnic origin, gender, and salary of my employees in a given organization hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization
- Effective Date

The report includes employees who have a primary assignment within the selected organization hierarchy during the period on the selected Effective Date.

Headings and Calculations

This worksheet uses the following calculations:

- **Annual Salary**

  Calculates a person's annual salary as of the current date.

7

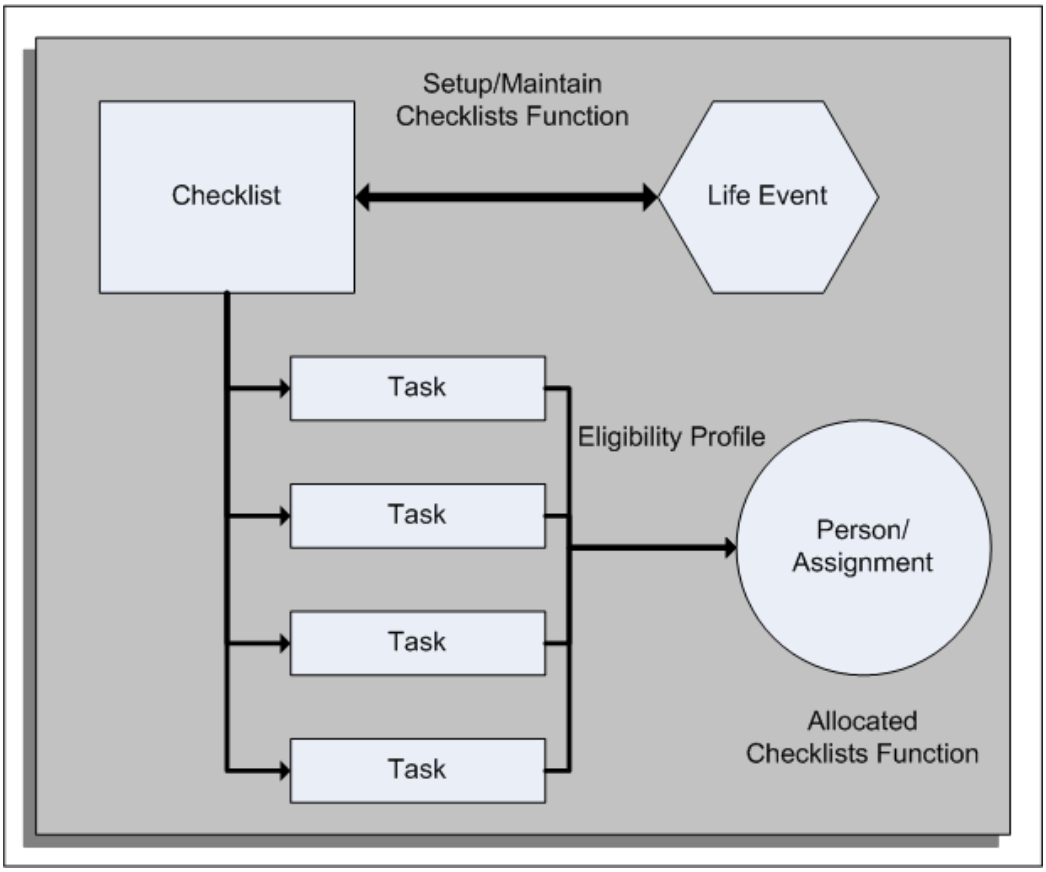
Checklists

Checklists Overview

Some HR actions, such as employee hiring, transfer, or termination, require the completion of standard tasks, for example, printing contracts, reassigning resources, and creating users. The Checklists functionality in Oracle HRMS enables you to link the HR action to a life event and generate checklists when the life event is initiated. The application then allocates the checklists to a person or assignment. Each allocated checklist contains the tasks relevant to an individual or assignment. The relevance of the tasks to the person or assignment is determined using eligibility profiles.You can assign each task to a performer either automatically using Oracle Approvals Management (AME), or manually.

After creating a checklist, you can use the Allocated Checklists functionality in Oracle Self-Service Human Resources (SSHR) to display and update the allocated checklists for your direct reports.

Overview of Checklist Functionality



The graphic shows the relationships between checklist components. You can link the checklist to a life event, for example, a New Hire life event, and link each task to an eligibility profile. The tasks that appear on the Allocated Checklists page for each person or assignment depend on the life event and the person's or assignment's eligibility for the task. For example, if you create a location-based eligibility profile for a task, that task appears in the Allocated Checklists page only if the person or assignment meets the eligibility criteria.

Creating Checklist Templates

You create and maintain checklist templates from the Setup/Maintain Checklists menu option using an HRMS Manager responsibility. Using the Create Checklist page, define the checklist and its behavior, for example, you enter the checklist name and category.

> **Note:** Oracle provides selected checklist categories; however, you can create additional categories if required.

See: Setting Up Checklists, page 7-4

When you create a checklist template, you can link the template to a life event to ensure that the checklist allocated to a person or assignment is appropriate to the HR action being performed.

Creating Checklist Tasks

You create and maintain checklist tasks from the Setup/Maintain Checklists menu option when you create a checklist template. You enter attributes to define the task and its behavior, for example, you enter the task name and specify whether the task is mandatory. If you define a task as mandatory, the self-service manager cannot delete it from an allocated checklist.

You can enter a task duration. When the task appears in an allocated checklist, the date in the Target End Date column reflects this duration.

When you create a checklist task, you can link an eligibility profile to the task. The application allocates tasks to persons or assignments based on these eligibility criteria.

You can use Oracle Approvals Management (AME) to generate a list of performers for the task. To activate AME, you select a value in the Approvals Identifier field of the Checklist Tasks page. The application retrieves the values available for selection from the values you have defined in AME and used in the AME conditions. You can create approval rules based on the task and person's details such as business group, organization name, job, position, or supervisor name.

See: Identifying Performers for Checklist Tasks, page 7-6

Assigning Tasks to Performers

If you are using Oracle Approvals Management (AME) to identify performers for a checklist task, the performers automatically receive notification of the task from Oracle Workflow when the task appears in an allocated checklist.

See: Identifying Performers for Checklist Tasks, page 7-6

Alternatively, you can manually assign a performer for a task, either when you create the task or when the task appears in an allocated checklist. If you designate a manager as the performer for a task, the manager can reassign the task from the Allocated Checklists > Update Checklist Task page.

Allocating Checklists to People and Assignments

When you invoke the Allocated Checklists function in Oracle Self-Service Human Resources, the application automatically runs the Allocated Checklists concurrent process for the relevant person or assignment. This process identifies whether any life event has occurred for the person or assignment since the last process run and allocates the appropriate checklist. When a manager uses SSHR to view the allocated checklists for a person or assignment, the application displays all allocated checklists.

Note: You should also run the Allocated Checklists concurrent process frequently to keep the allocations up-to-date.

See: Running the Allocate Checklists Process, page 7-10

Managing Tasks and Checklists

You create tasks using the Setup/Maintain Checklists function, however, you can also maintain tasks and checklists from the Allocated Checklists function. You can maintain the attributes for tasks and checklists, for example, the task or checklist name. From the Allocated Checklists page, you can also delete tasks and checklists.

Note: When you delete an allocated checklist or task from the Allocated Checklists page, you do not delete the corresponding checklist template and task from the database. To delete a checklist template or task from the database, you must use the Setup/Maintain Checklists function. In addition, tasks do not disappear from the allocated checklist automatically when complete; you must delete them yourself if required.

When you display an allocated checklist for a worker on the Allocated Checklists page, you can perform the associated task actions yourself or update the task to assign an alternative performer. When you have processed a task, you can change the task status as appropriate (for example, Completed, Rejected, Outstanding, Suspended).

If necessary, you can change the task duration to generate a new end date for the task.

See: Allocated Checklists, *Oracle HRMS Deploy Self-Service Capability Guide*

Setting Up Checklists

The following process describes how to set up your checklist templates and tasks.

For information on checklists, see: Checklists Overview, page 7-1

1. Create checklist life events. You use life events to process major changes in a person's life, for example, marriage, new employment, or the birth of a child. When a checklist life event occurs, the application initiates the appropriate checklist for the life event.

   Note: If you omit this step, the checklist is available for all persons and assignments, irrespective of the HR action being performed.

   See: Defining General Characteristics of Life Event Reasons, *Oracle HRMS Compensation and Benefits Management Guide*

2. Create eligibility profiles.

   You use eligibility profiles to tailor the list of tasks to a person or assignment. For example, using a location-based eligibility profile, you can define one version of a checklist for a new hire in the U.K. and a different version for a new hire in Japan.

   > **Note:** If tasks do not have eligibility profiles attached, the application assigns them to all persons and assignments with that checklist.

   See: Defining an Eligibility Profile, page 6-69

3. Create flexfield segments to provide additional context information for the checklist or task, if required. The flexfield names are Additional Allocated Checklist Details (PER_ALLOCATED_CHECKLISTS) and Additional Allocated Task Details (PER_ALLOCATED_TASKS).

   For example, you could create a location-based context to provide additional information on a U.S. New Hire checklist.

   See: Defining Descriptive Flexfields, *Oracle E-Business Suite Flexfields Guide*

4. Create your checklist categories. Oracle provides the following predefined checklist categories:

   - On-Boarding

     Covers all HR processes and procedures involved in hiring and integrating a worker in your organization. This category includes recruitment, hiring, and orientation.

   - Off-Boarding

     Covers all HR processes and procedures involved in removing a worker from your organization. This category includes termination, relocation, and long-term sickness.

   You can create additional categories by creating new lookup values for the CHECKLIST_CATEGORY (Checklist Category) lookup type.

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

5. Define Oracle Approvals Management (AME) processes to generate lists of performers for checklist tasks. Performers are the people who carry out the tasks.

   > **Note:** In the context of the checklist functionality, AME generates a list of **performers**; however, the equivalent terminology in AME is a list of **approvers**.

Oracle HRMS provides the transaction type CHECKLIST; however, you must set up all required approval groups, rules, and conditions.

See: Identifying Performers for Checklist Tasks, page 7-6

If you prefer to assign performers manually, omit this step.

6. Create your checklist templates using the Setup/Maintain Checklists function.

   See: Checklists Overview, page 7-1

7. Create your checklist tasks using the Setup/Maintain Checklists function.

   See: Checklists Overview, page 7-1

8. Schedule the Allocate Checklists process to allocate checklists and associated tasks to people and assignments.

   See: Running the Allocate Checklists Process, page 7-10

Identifying Performers for Checklist Tasks

You can use Oracle Approvals Management (AME) in conjunction with the Checklists function to designate a task performer automatically. When you create a task, you can assign an Approval Identifier. The application passes this value to AME and generates the list of approvers for each task using attributes, rules, and approval groups.

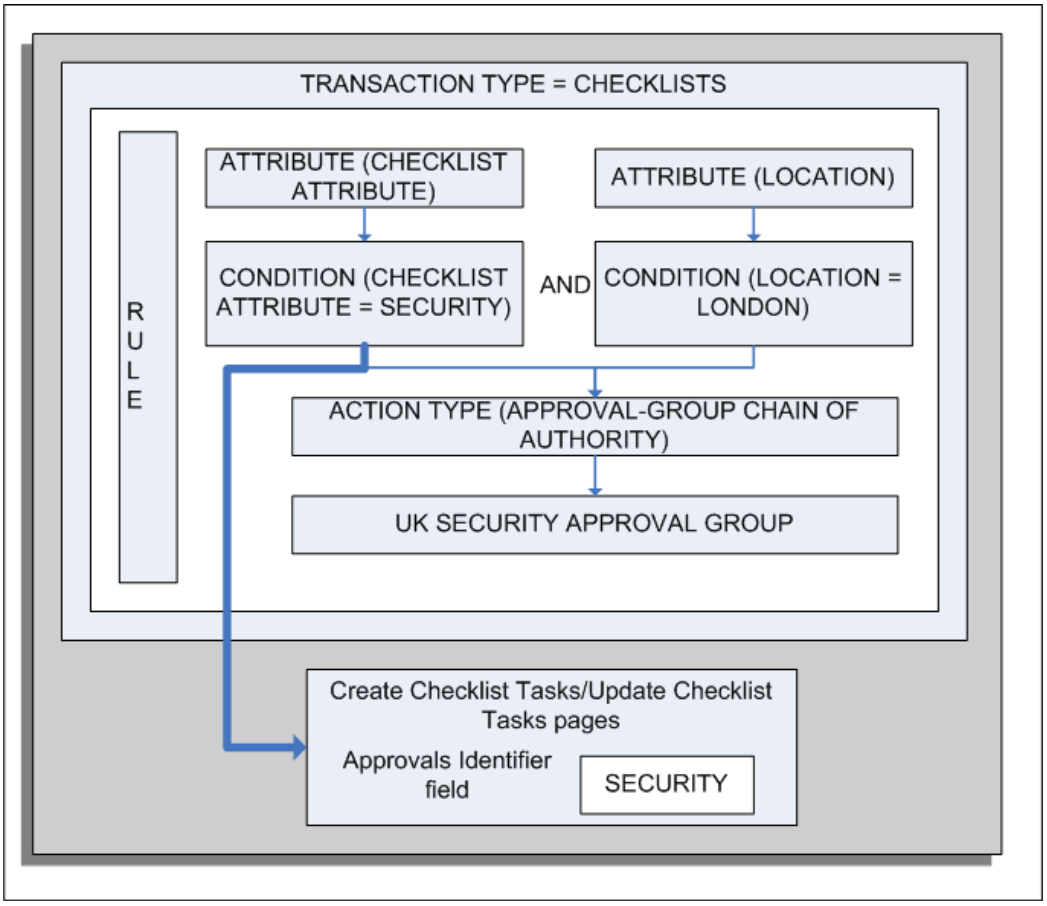
For general information on AME, see: Overview of Oracle Approvals Management, *Oracle Approvals Management Implementation Guide*

Oracle provides the transaction type CHECKLIST and the approvals attribute CHECKLIST_ATTRIBUTE. The CHECKLIST transaction type enables you to create approval rules based on the task and person's details such as business group, organization name, job, position, or supervisor name.

Before attempting to set up AME, you should plan your approval requirements. For information on designing approvals processes in AME, see: Planning your Organization's Approval Processes, *Oracle Approvals Management Implementation Guide*.

The following figures show an example use of AME components for checklists.

Using AME for Checklists - Example 1

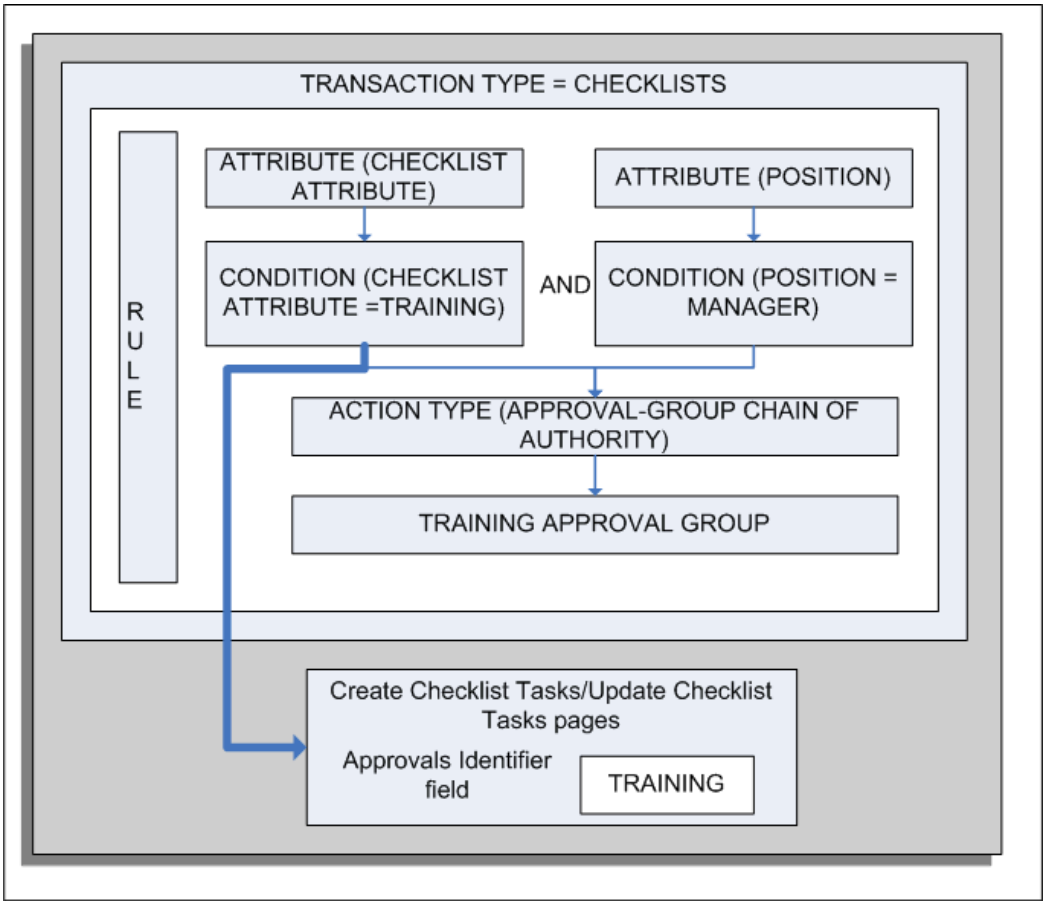


This figure shows the standard AME components and their use in the Checklists functionality. The approval rule shown has the following outcome:

- If the Checklist attribute is SECURITY and the Location attribute is London, then AME uses the UK SECURITY approval group to identify the task performers.

  The SECURITY attribute value appears n the list of values for the Approvals Identifier field in the Create Task and Update Task pages.

Using AME for Checklists - Example 2



This example shows an approval rule that is designed to inform the training department about training sessions for new hires to the manager position in an enterprise. In this example:

- If the Checklist attribute is TRAINING and the POSITION attribute is Manager, who is a new hire, then AME uses the TRAINING approval group to identify the task performers.
- The TRAINING attribute value appears in the list of values for the Approvals Identifier field in the Create Task and Update Task pages.

You define AME components using the Approvals Management Business Analyst responsibility.

To set up AME for checklists:

1. From the Business Analyst Dashboard, query the CHECKLIST transaction type (Transaction Type Key = CHECKLISTID) in the Approval Process Setup region.

This region contains links to the setup pages for the AME components.

> **Note:** For more information about the Approvals Management Business Analyst responsibility, see: AME Roles and Responsibilities, *Oracle Approvals Management Implementation Guide*.

2. Select an AME component to define. For example, select the Attributes link to display the delivered attribute CHECKLIST_ATTRIBUTE. If required, add additional attributes to your transaction type.

3. Select the Conditions subtab to define the conditions for your transaction type. You must define regular conditions for every possible value for the Checklist attribute, for example:

   - CHECKLIST_ATTRIBUTE is SECURITY
   - CHECKLIST_ATTRIBUTE is RESOURCES
   - CHECKLIST_ATTRIBUTE is REFERENCES

   > **Note:** The condition values you define here are passed to the Create Checklist Tasks and Update Checklist Tasks pages and appear in the list of values (LOV) for the Approvals Identifier field (see figure). The values relate to the type of task, for example, a security task, resource allocation task, or reference check task.

4. If required, create List Modification conditions. For example, you can create a Final Approver condition and identify the approver.

5. Select the Approval Groups subtab to define the approval groups for your transaction type.

   For example, you could create an approval group called UK Security to contain the list of performers who would carry out the task in question.

   > **Note:** Oracle recommends that you select the "First responder wins" voting regime for your approval groups. This ensures that only one performer carries out the task. When the performer completes the task and updates the notification, the associated workflow process automatically updates the task status to Completed or Rejected.

6. Select the Rules tab to define your rules by combining your attributes, conditions, action types, and approval groups. Each rule can contain multiple conditions.

7. Select the Test Workbench tab to create a test transaction for your rule.

See: Overview of Testing, *Oracle Approvals Management Implementation Guide*.

Running the Allocate Checklists Process

You run the Allocate Checklists concurrent process to identify any checklist life events that have not yet been processed. For each life event, the process allocates the checklist to the person or assignment and builds the list of checklist tasks based on the eligibility profiles.

You should schedule the Allocate Checklists process to run regularly, depending on the number of employees and the frequency with which life events occur. For example, you could schedule the process to run once a day since life events occur within a date context.

> **Note:** When you select the Allocated Checklists function, the application runs the Allocate Checklist process automatically for that person or assignment. This ensures the checklists displayed from the Allocated Checklists function always display current data. However, it is important to run the Allocate Checklists process regularly to minimize processing effort and load times at logon.

You run the Allocate Checklists process from the Submit Requests window.

To run the Allocate Checklists process:

1. In the Name field, select Allocated Checklists and Task Process.
2. Submit the process.
3. Close the window.

Glossary

360-Degree Appraisal

Part of the Performance Management 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-42

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-35, *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

Deviation

A change to the standard approver list is a deviation.

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-35

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-35, *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

In Oracle HRMS and DBI for HRMS, the term Incumbent refers to an active worker (employee or contingent worker).

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, My Oracle Support (formerly MetaLink) and Learning Management.

Initiator

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 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 then the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an 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 Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

A 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-36

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-38, *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 Ministere du Revenu du Quebec.

Reversal

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

Salary Basis

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

Scheduled Enrollment

A benefits plan enrollment that takes place during a predefined enrollment period. Scheduled enrollments can be administrative, or open.

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 groupsenable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-36, *Security Profile*, page Glossary-38, *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-36

Self Appraisal

Part of the Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Separation Category

Separation category groups the leaving reasons. HRMS*i* refers to Termination Category as 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-40

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

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

Special Information Types

Categories of personal information, such as skills, that you define in the Personal

Analysis key flexfield.

Special Run

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

SSHR

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

SSP

See: *Statutory Sick Pay*, page Glossary-40

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.

Transcentive

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

Unit Standard

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

Unit Standard Competency

A competency that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

Upload

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

User Assistance Components

SSHR online help comprising tips and instructions.

User Balances

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary-6

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their

exact requirements.

See also: *Responsibility*, page Glossary-36, *Security Profile*, page Glossary-38

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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