Oracle® Human Resources Management Systems

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

Release 12.1

Part No. E13531-09

May 2015

ORACLE

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide (UK), Release 12.1

Part No. E13531-09

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HRMS Glossary

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Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide (UK), Release 12.1

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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).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide (UK).*

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 xiv for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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Structure

1 Recruitment and Hiring
2 People Management
3 Talent Management
HRMS Glossary

Related Information Sources

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

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

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

Guides Related to All Products

Oracle 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

Recruitment and Hiring

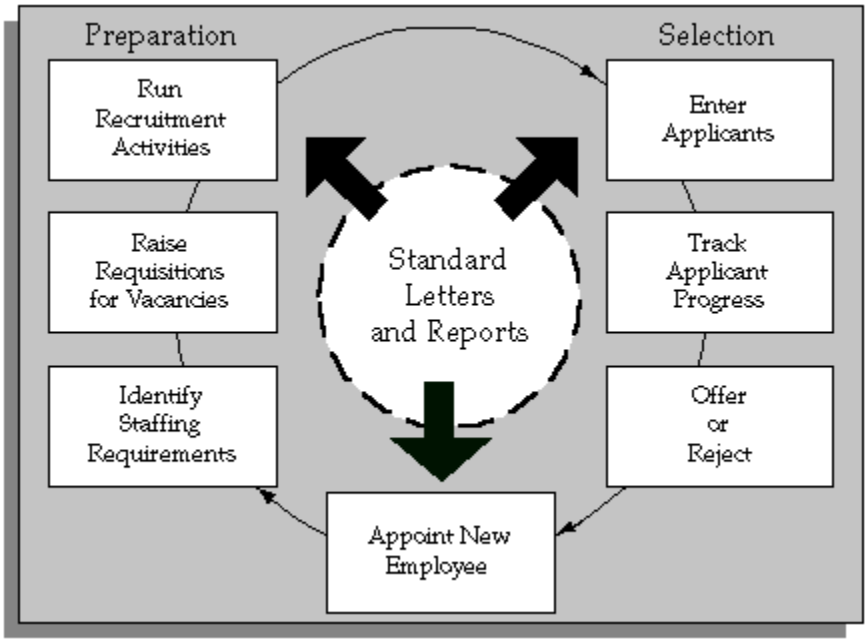
Recruitment and Hiring Overview

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

Oracle HRMS and the Recruitment Cycle

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

The Recruitment Cycle



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

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

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

Recruitment Using Oracle iRecruitment

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

See: iRecruitment Overview, *Oracle iRecruitment Implementation Guide*

Recruitment Using Oracle Self-Service Human Resources

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

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

Reporting on Recruitment

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

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

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

Key Concepts

To effectively use Oracle HRMS for recruitment management, see:

- Applications, page 1-10
- Applicant Assignments, page 1-10
- Applicant Assignment Statuses, page 1-12
- Recruitment Using People Management Templates, page 1-32

Recruitment and Hiring

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

How can you advertise your vacancies internally?

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

How can you manage the interview process?

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

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

How can you match applicants to vacancies?

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

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

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

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

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

How can you manage the hiring process?

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

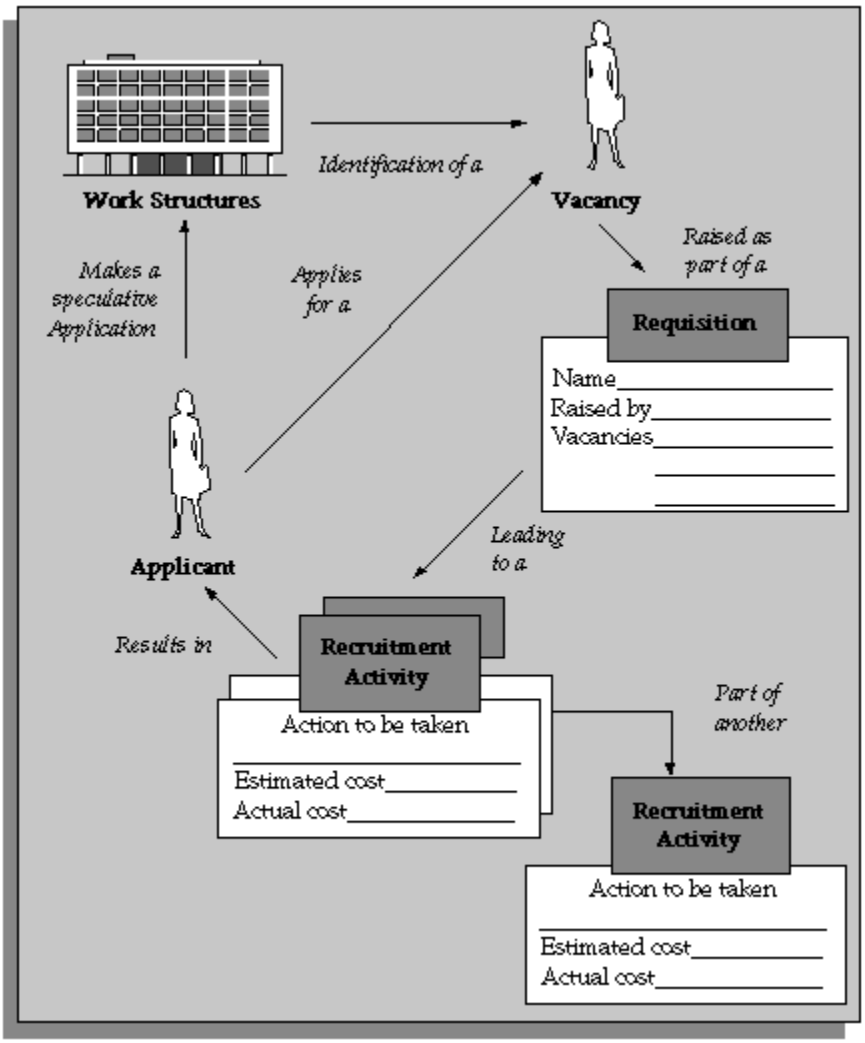
In addition, the hiring process supports a wide range of other business needs, such as back-to-back employment. It also provides you with validation. For example, you cannot rehire an ex-employee if the final process date for the previous employment is still blank. This validation ensures that the information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

Recruitment Preparation

Recruitment Preparation

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

Recruiter Preparation



Identification of Staff Requirements

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

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

Vacancy Requisitions

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

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

Updating Vacancies

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

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

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

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

Oracle SSHR and Vacancy Advertisements

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

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

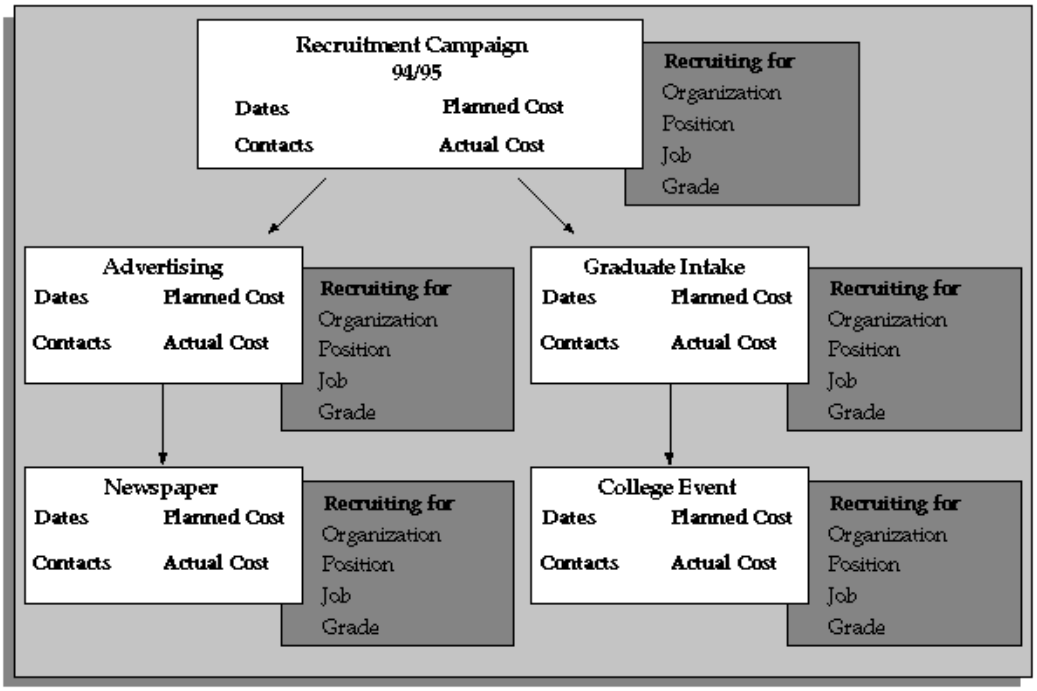
categories (Lookup Type VACANCY_CATEGORY), then select the appropriate category while completing the Requisition and Vacancy window.

Recruitment Activities

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

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

Recruitment Activities



Raising a Requisition for a Vacancy

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

To raise a requisition for a vacancy:

1. Enter the requisition and save it before beginning to define the vacancy.

2. Enter a name and number of openings for the vacancy.

3. Optionally enter a description and select a status.

4. You can select one or more assignment components to define the vacancy.

5. Optionally enter the name of the recruiter.

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

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

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

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

Defining a Recruitment Activity

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

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

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

To define recruitment activities:

1. Enter the details of the recruitment activity.

   You can enter the name of a 'parent' recruitment activity in the Within Recruitment Activity region, if the activity you are defining is part of a campaign.

2. Choose the Recruiting For button to select one or more vacancies to associate with the activity.

Viewing Vacancies

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

To view vacancies:

1. Enter selection criteria in any of the fields in the top half of the window.

   Leave all these fields blank to see all vacancies in your Business Group.

2. Choose the Find button to see the vacancies that correspond to the criteria you have entered.

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

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

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

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

Selection Processing

Selection Processing

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

The tasks involved in selection processing include:

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

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

Applications and Assignments

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

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

Additional Application Information

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

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

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

See: Competency Profiles, page 3-28

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

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

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

  See: The Special Information Approach to Skills Matching, page 3-46

Application Entry Methods

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

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

Back-to-Back Applications

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

Suitability Matching

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

See: Suitability Matching, page 3-30

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

applicants.

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

Applicant Assignment Group Updates

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

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

Updating Vacancies

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

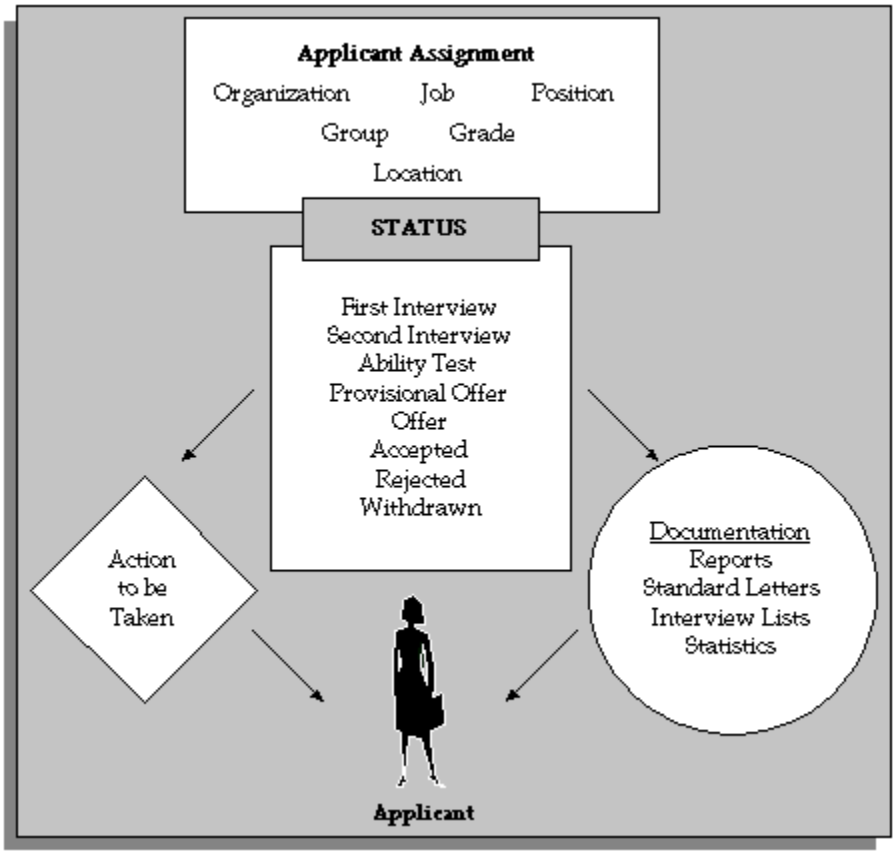
Full Applicant Details Report

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

Applicant Assignment Statuses

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

The Applicant Assignment and its Status



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

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

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

assignment; it causes the assignment to end.

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

See: Defining Assignment Statuses, page 2-120

Primary Applicant Assignment Statuses

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

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

- Application
- Applicant Interview
- Terminate Applicant

When you change the status, you can enter a reason for the change. Define valid reasons as values for the Lookup Type APL_ASSIGN_REASON.

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

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

Secondary Applicant Assignment Statuses

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

See: Defining Secondary Statuses, page 2-121

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

See: Entering Secondary Assignment Statuses, page 2-134

Interviews and Other Recruitment Events

Interviews

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

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

See: Scheduling an Interview, page 1-18

Recruitment Events

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

See: Event and Attendance Administration, page 3-49

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

Applicant and Interview Reports

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

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

Application Termination

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

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

See: Cancelling an Applicant Record, page 1-19

Recording an Application Quickly

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

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

To record an application quickly:

1. Select a title and a gender for the applicant.

2. Select the person type you want to use for this applicant. The list of available person types shows all the user person types that can be used to identify applicants.

3. Enter the applicant's name and an identifying number recognized by the system.

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

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

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

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

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

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

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

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

8. You can select a recruitment activity. If there is only one vacancy for the activity, the vacancy details appear automatically.

9. If you select a vacancy, applicant assignment information is displayed from the vacancy record. You can add to this information or change it. However, if you change it, the vacancy field clears.

10. If you do not select a vacancy, you can enter assignment information in the Vacancy Applied For region. If you do not enter an organization, it defaults to the Business Group.

11. Select a status for the application. By default a new application has the status Active Application (or an equivalent user status defined on your system).

12. Save your work.

    If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details.

    See: Multiple Person Records, page 2-38

Entering Full Application Information

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

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

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

See: Applicant Assignment Statuses, page 1-12

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

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

To enter an application in full:

1. Set your effective date to the date you want the applicant assignment to begin, such as the closing date for applications.

2. Enter personal information for the applicant in the People window.

   See: Entering a New Person, page 2-33

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

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

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

5. If the application is for a specific vacancy, select the recruitment activity and vacancy. Assignment information from the vacancy is displayed. You can add more assignment details.

6. Select an applicant assignment status and the reason for giving this status. The applicant assignment status is the key to processing the application.

7. Optionally you can enter information, in the tabbed regions, about the following:

   - The recruiter who is responsible for handling the application
   - The supervisor of the assignment and the supervisor assignment number
   - The standard conditions and probation period for the assignment
   - The source of the application, such as the type of recruitment activity, or the organization that recommended the applicant, or the employee who referred the application
   - The employment terms under which the applicant would be hired, such as the contract or collective agreement that would be applicable

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

Scheduling an Interview

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

You perform this task using the Applicant Interview window.

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

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

To schedule applicant interviews:

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

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

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

   You cannot enter a status when:

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

Cancelling an Applicant Record

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

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

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

To cancel an application in the Application window:

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

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

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

To cancel an application in the People window:

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

Updating Applicant Assignments by Group

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

To update a group of applicant assignments:

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

Rejecting an Application

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

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

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

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

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

See: Canceling an Applicant Record, page 1-19

To terminate an applicant:

1. Enter the termination date.
2. Enter the status Terminate Application, or your User Status equivalent.

   This is not required, but you might use it to trigger generation of a rejection letter.

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

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

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

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

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

Canceling a Termination

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

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

Running the Requisition Summary Report

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

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

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

You run reports from the Submit Requests window.

To run the Requisition Summary Report:

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

Appointment

Appointments and the Hiring Process

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

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

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

Hire Dates and Future-Dated Changes

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

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

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

Back-to-Back Employment and Placements

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

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

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

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

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

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

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

Earliest Hire Dates

- An applicant's earliest hire date is either 1 day after you accept the application or the day after the last of any future-dated changes, whichever is later.

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

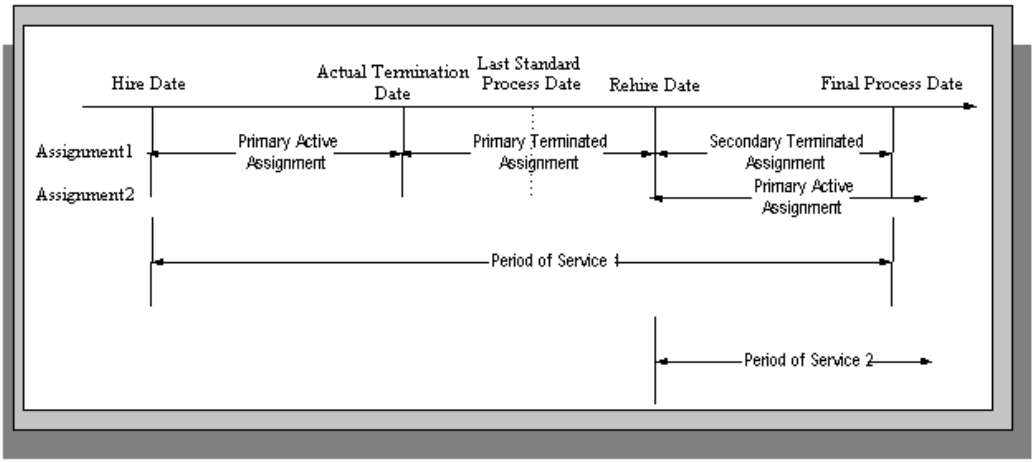
  > **Note:** Australia, Canada, China, Denmark, Hong Kong, India, Ireland, Korea, Kuwait, Mexico, New Zealand, Norway, Saudi Arabia, Singapore, South Africa, Russia, UK, US, United Arab Emirates, and International Payroll users can rehire ex-employee before the final process date. See: Rehire Before Final Process Date, page 1-24

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

Rehire before Final Process Date

Australia, Canada, China, Denmark, Hong Kong, India, Ireland, Korea, Kuwait, Norway, Mexico, New Zealand, Saudi Arabia, Singapore, South Africa, Russia, UK, US, United Arab Emirates, and International Payroll Only: To provide greater flexibility in the hiring process, Oracle HRMS enables you to rehire a terminated employee before the Final Process (and after the Last Standard Process) date for their previous period of service.

Rehire before Final Process Date



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

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

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

Valid Person Types for Applicants

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

Hiring an Applicant (People Window and Application Window)

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

To hire an applicant:

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

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

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

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

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

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

- Retain all accepted and unaccepted applicant assignments.
- Convert the accepted applicant assignments to secondary assignments.
- End date the unaccepted or other accepted applicant assignments.
- Check the primary check box to indicate which assignment will be the primary employee assignment.

8. Save your work.
9. **Mexico only**: Enter your new employee's previous employment details as defined by their Format 37.

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

Enrolling New Hires in the Compensation Plans:

After you hire iRecruitment applicants, run the iRecruitment Create Enrollment process to enroll new hires in the compensation plans included in their offer letters. For more information, see: Running the iRecruitment Create Enrollment Process, page 1-30

Updating the Assignment:

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

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

If you choose Yes where there are future dated assignments:

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

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

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

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

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

Hiring an Ex-Employee or Ex-Contingent Worker

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

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

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

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

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

US and Russian Payroll Only: You can rehire ex-employees before the final process date for their previous assignment. When you complete the rehire, the application changes the existing, terminated assignment to a secondary assignment, and the new

active assignment becomes the primary. You can then process payments from both assignments during the overlapping periods of service.

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

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

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

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

Changing the Hire Date

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

To change the hire date:

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

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

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

3. Save your changes.

Cancelling a Hire

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

Note: You cannot cancel a hire if:

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

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

To cancel a hire:

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

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

Running the iRecruitment Create Enrollment Process

In Oracle iRecruitment, when managers or recruiters create offers for applicants they can select the compensation plans for applicants. iRecruitment includes these compensation plans in the offer letters to applicants. As an HR administrator, you can run the iRecruitment Create Enrollment process to automatically enroll new hires in the compensation plans included in their offer letters. This program processes the compensation plans associated with an offer and creates the enrollment records for the employee.

Using this program, you can create enrollment records for:

- An individual person hired for a vacancy.
- All the employees hired for a vacancy.
- All the employees hired in a business group.

You run this process from the Submit Request window.

To run the iRecruitment Create Enrollment process:

1. Select the iRecruitment Create Enrollment Process in the Name field.
2. Click in the Parameters field to open the Parameters window.
3. Select the business group for which you want to run the process. iRecruitment processes the compensation plans for the new hires in this business group and enrolls them into the relevant compensation plans. The business group information is mandatory.
4. Optionally, you can run the process for a specific vacancy or an employee in the business group.

   If you leave these fields blank, then the application creates enrollment records for all the new hires in the business group.
5. Click Submit, and then OK.

What's Next

After you run the process, you can view the enrollments in the View Enrollment Results window. For more information, see: Displaying Enrollment Results, *Oracle HRMS Compensation and Benefits Management Guide*

Recruitment Using People Management

Recruitment Using People Management Templates

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

The template enables you to:

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

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

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

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

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

Entering a New Applicant

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

To enter a new applicant:

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

   The Personal tab is displayed for you to start entering information about the applicant.
4. Set your effective date to the date when you want the applicant assignment to begin, such as the closing date for applications. You can enter a date in the Date field next to the timeline bar and choose Go.
5. Enter personal information for the applicant.
6. Choose the Communication tab if you want to enter contact information, such as addresses and phone numbers.
7. Enter application information in the All Assignments, Compensation, and Schedule tabs, as required.

   See: Entering Application Information, page 1-34.
8. Your localization team may have setup other tabs for you to complete.
9. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

   If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, page 2-38

Recording an Application

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

To enter an applicant who is not yet recorded on your system, see: Entering a New Applicant, page 1-32.

To record an application:

1. In the Summary window, use the Data Organizer to select the person. Use the Find window if you need to search for the person.

2. Set your effective date to the start date for the new application.

3. Choose the Actions button.

4. Select one of the following and choose Next:

   - Apply for Internal Vacancy (if the person is an employee)

   - New Application (if the person is already an applicant)

   - Apply for Job (if the person is external - neither an employee nor applicant)

5. For employees and external people, select the correct person type and choose Next. For example, for an employee you might select Employee and Applicant.

6. Choose Finish.

   A new default application is created for the person.

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

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

   For information about the fields on the Application, Compensation, and Schedule tabs, see: Entering Application Information, page 1-34.

Entering Application Information

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

To enter or update application information:

1. In the Summary window, use the Data Organizer to select the application and choose Show Details.

2. If you are updating an application, set your effective date to the date the information should change.

3. Choose the All Assignments tab.

4. Enter the date the application was received.

5. Select an Application Status and the reason for giving this status.

6. If the application is for a specific vacancy, select the recruitment activity and vacancy. Assignment information from the vacancy is displayed. You can add more assignment details.

7. Optionally, you can enter information about the following:
   - The recruiter who is responsible for handling the application
   - The source of the application, such as the type of recruitment activity, or the source organization that recommended the applicant, or the employee who referred the application.

8. Choose the Compensation tab if you need to enter a payroll, salary basis, or proposed salary. The salary basis is the duration for which salary is quoted, such as per month or per year.

9. Choose the Schedule tab to enter information about normal working hours or probation period for the assignment.

10. Enter information in any other tabs that may have been created for your localization. For example, many localization teams will include an Extra Information tab to enable you to enter country-specific information.

11. Choose Correction or Update. Remember to choose Correction if you are correcting information that was created by default.

12. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

Making an Offer to an Applicant

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

To make an offer to an applicant:

1. In the Summary window, use the Data Organizer to select the applicant. Use the Find window if you need to search for the person.

2. Set your effective date to the date of the offer.

3. Choose the Actions button.

4. Select Make an Offer and choose Next.

5. Select the assignment status and choose Finish.

6. Choose the Checklist tab and update the Send Offer checklist item to reflect that the offer has been made, if required.

7. Save your work.

Changing an Applicant's Status to Accepted Offer

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

To change the applicant's status to Accepted Offer:

1. In the Summary window, use the Data Organizer to select the person you want to update. Use the Find window if you need to search for the person.

2. Choose the Actions button.

3. Select Applicant Accepted and choose Next.

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

Hiring an Applicant

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

To hire an applicant:

1. In the Summary window, use the Data Organizer to select the person you want to hire. Use the Find window if you need to search for the person. If you want to hire the person into one specific application then select this.

2. Choose the Actions button.

3. Select one of the following actions and choose the Next button:

   - **Hire Applicant into all accepted assignments**. Select this action if you want to hire the applicant into all the applications that have been accepted, and to delete all other applications for this person.

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

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

   A list of accepted applications is displayed.

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

   - Yes. Make existing assignment secondary:

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

   - Yes. Merge with existing primary assignment:

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

   - Yes: Replace existing primary assignment:

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

   - No. Create new secondary assignment:

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

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

Ending an Application

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

To end an application:

1. In the Summary window, use the Data Organizer to select the person whose application you want to end. Use the Find window if you need to search for the person.
2. Set your effective date to the date for ending the application.
3. Expand the person's node and select the application.
4. Choose the Actions button.
5. Select End Application and choose Next.
6. If the applicant has more than one application, go to step 8, page 1-38. Otherwise, select a new person type, such as ex-applicant and choose Next.
7. If you want to record reasons for rejecting applicants, select a reason and choose Next.
8. Choose Finish.

Reactivating an Application

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

To reactivate an application:

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

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

Terminating an Applicant

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

To terminate an applicant:

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

2

People Management

People Management Overview

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

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

Managing Workforce Details

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

- **Workforce Assignments**: Record the details about the different work an employee, or a contingent worker does in your enterprise and relate them to your overall work structure.
- **Identify Workforce and Assignments**: Use unique numbers to distinguish your workers and their roles.
    - Person number: Identifies every employee, contingent worker, or applicant in

your business group.

- Assignment number: Identifies every assignment in your business group.

- **Person Types**: Record information related to different groups of people such as applicants, employees, and contingent workers and restrict access to the different group records.

- **Assignment Statuses**: Record changes in the work status of an employee or a contingent worker with statuses such as Active, Suspended, and Terminated. For example, if an employee is on maternity leave you can assign the Suspended status. To identify different work statuses in your enterprise you can expand the predefined system statuses and set up your own multiple *user* statuses. For example, you can define the user statuses of maternity leave, paternity leave, and military leave for the system status of Suspended.

Managing Your Workforce

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

- **People Management Templates**: To complete tasks like entering people and hiring applicants. Your system administrator can modify the templates to create windows that are specific to your business processes.

- **People and Assignment Windows**: To enter, track, and report on people on a day to day basis. You use these windows if People Management templates are not set up in your enterprise.

Recording Additional Information

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

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

Workforce Management Using Oracle Self-Service Human Resources

Oracle Self-Service Human Resources (SSHR) enables line managers, employees, and contingent workers to update their personal and professional information through interfaces personalized to their roles, work content, and information needs. Line managers can perform day-to-day HR tasks such as updating the employees'

assignment details and processing transfers, promotions, and terminations. To work with Oracle SSHR, you must purchase the license from Oracle. For information on licenses, contact your Oracle sales representative.

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

Reporting on Workforce Management

Oracle HRMS and Oracle HR Intelligence (HRI) provide a range of reports to track your workforce deployment. For example:

- Oracle HRMS offers the Assignment Status report, listing people assigned to particular organizations, jobs, positions, and grades with specific assignment statuses.

- Oracle HRI offers the Employee Separation by Reason (Organization Hierarchy) Status Analytics by Organization worksheet. This worksheet outlines the reasons for employees' separation in different organizations of your enterprise. To work with Oracle HRI reports you must purchase the appropriate license from Oracle. For information on licenses, contact your Oracle sales representative.

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

Key Concepts

To effectively use Oracle HRMS for workforce management, see:

- People in a Global Enterprise, page 2-7
- The Employee Assignment, page 2-61
- Contingent Workers, page 2-82
- Assignment Statuses, page 2-115
- Overview of Self-Service Actions, page 2-148
- Template Windows User Interface, page 2-193

People Management

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

Using Oracle HRMS you can hold, inquire on, and track a wide range of personal

information. This can include medical details, work schedules, preferred languages for correspondence, and personal contacts, as well as the basic details such as date of birth, employee number, and addresses.

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

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

Can you enter information specific to your enterprise?

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

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

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

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

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

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

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

Does Oracle HRMS provide features to update worker information across business groups using a single responsibility?

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

When you perform a search, the Summary and Maintain windows display the business

group to which the worker belongs. In addition, the key flexfields, descriptive flexfields, special information types, and extra information types display data that is appropriate to that worker's business group.

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

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

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

What are personnel actions?

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

Personnel Actions fall into three overall types:

- Hiring
- Deployment
- Termination

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

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

You can process multiple actions on the same person concurrently, so you needn't wait for other actions to process before initiating one of your own. The application calculates a person's eligibility for you automatically. Approvers can return an action to any previous approver for correction. Any approver on the chain with appropriate permissions can update an action, even change the effective date. You can also specify the date on which an action takes effect, or make it effective on final approval. The application gives you easy access to information about your people, the other approvers on the chain of recipients, your pending actions, and actions on your people awaiting the approval of others.

Document management features enable you to automatically generate business documents, such as a request or notification, correspondence, or a contract. "What-If" analysis enables you to see the impact of your proposed change on a person's

entitlement to compensation or benefits, before submitting the change for approval. You can attach supporting documents to an action, such as a resume, certificate, photo, or web address.

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

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

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

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

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

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

People

People in a Global Enterprise

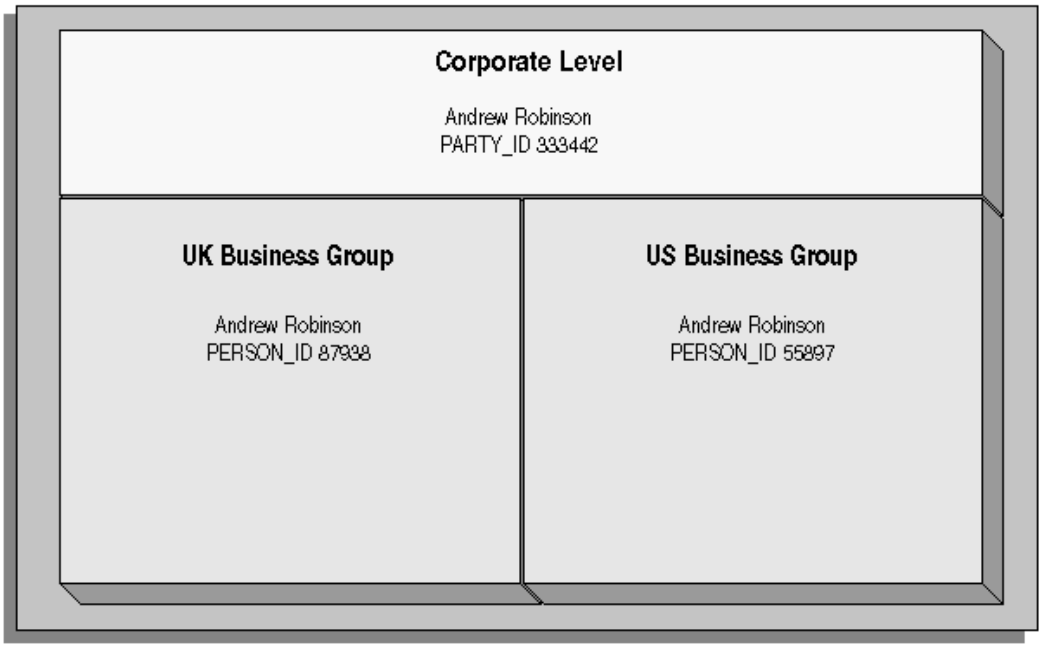
Based on a common core application for all countries, Oracle HRMS provides you with the ability to support both local and corporate requirements for global enterprises.

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

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

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

A Multi-Organization Person Record



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

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

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

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

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

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

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

Benefits of Linked Person Records

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

- Qualifications
- Establishments attended
- Competencies

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

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

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

See: Person Record Synchronization, page 2-21

Duplicate Person Search

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

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

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

Guide

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

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

Validating People in Multiple Business Groups

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

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

- Employees, applicants, and contingent workers have both corporate and legislative records.

- Ex-employees, ex-applicants, and ex-contingent workers retain both corporate and legislative records.

- People whose system person type is Other have a legislative record only.

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

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

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

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

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

Transferring Employees Between Business Groups

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

See: Employee Transfers and Secondments, page 2-91

Person Numbering

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

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

Person Names

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

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

See: Person-Name Formats, page 2-26

Tracking People's Roles and Activities

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

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

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

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

Tracking peoples roles and activities table:

Window	Purpose	See
Application	Describes the vacancy for which an applicant has applied	Applications and Assignments, page 1-10
Book Events	Records that an employee or applicant will attend an event. The event must already be defined in the Event Bookings window. If you use Oracle Learning Management, see: Introduction to Oracle Learning Management, *Using Oracle Learning Management*	Event and Attendance Administration, page 3-49
Employee Review	Schedules and records details of an employee's review or other interview type	Employee Reviews, page 3-51
Applicant Interview	Schedules and records details of an applicant's interviews	Interviews and Other Recruitment Events, page 1-15
Assignment	Records details of an employee's assignment	The Employee Assignment, page 2-61
Contract	Records details of an employee's contract	Entering Contracts, page 2-54

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

Windows for Maintaining Personal Information

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

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

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

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

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

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

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

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

Displaying Personal Information

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

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

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

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

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

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

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

Identifying Employees, Contingent Workers, and Assignments

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

- Employee number
- Contingent worker number
- Assignment number

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

See Finding a Person Using the Find Person Window, page 2-32 or Finding a Person or Group of People, page 2-199

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

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

Employee Number

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

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

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

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

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

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

Contingent Worker Number

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

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

Changing the Number Generation Method

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

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

Global Person Numbering

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

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

even when global person numbering is in effect.

See: Employee Transfers and Secondments, page 2-91

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

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

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

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

The Assignment Number

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

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

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

Employee Name: Samantha Green

Employee Number 1012

1st Assignment Number 1012

2nd Assignment Number 1012-02

Person Extra Information Types

You can define as many Extra Information Types as you require to hold information

about people. There are also some predefined person EITs.

> **Note:** To be able to access the predefined EITs, you must link the EIT to your responsibility.
>
> See: Setting Up Extra Information Types Against a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The predefined person EITs are:

Alien Income Forecast

Type of income a visa holder receives, as well as the amount and the year in which the income was received.

AU Paid Parental Leave Reference Number (Australia Only)

Information about the Paid Parental Leave reference number and the start and end dates of the paid parental leave.

Global Work Permit

Information about the work permit an employee holds.

Oracle Student System (OSS) Person Details

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

Passport Details

Information about the visa holder's passport, such as country of issue, passport number, issue date and expiry date.

Singapore users: Do not use this EIT. You must enter passport information using the Passport tab in the Person window or your year-end reporting information may be incomplete.

Self Service Preference for Person

Information on a person's preferences for online documents such as the online payslip or online tax forms. The EIT determines whether the documents are available online or in a printed format, what template you are using for XML Publisher, the stored procedure do you want to use, and the date when you want to implement these changes.

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

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

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

These information levels are arranged in a hierarchy; if you define self-service preferences at the person level, the settings 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.

Visa Details

Information about the visa an employee holds, such as visa type, visa number, issue date and expiry date.

Visa Payroll Details

Information about the amount of income and benefit a visa holder receives.

Visa Residency Details

Information about a visa holder's residency, such as residency status, the residency status date, the first entry date and tax residence country.

Visa Visit History

Records a visa holder's visits to a country. The EIT stores information such as the purpose of the visit, the start and end dates of the visit, and whether the visa holder was accompanied by a spouse or children.

Previous Employment Details (Mexico Only)

Records employment tracking information required for End of Year calculations (Format 37 and DIM Attachment 1). Enter this information if the employee has worked for more than one employer in the current fiscal year.

Use the data provided by the employee's Format 37 to populate this information:

- Employer RFC ID: Previous employer RFC ID. When you run the Year End Archiver process, it validates the value you enter here and returns the appropriate

error message if it is in the incorrect format.

> **Note:** HRMS does not validate the format of the RFC ID you specify here. Validation takes place when you run the Year End Archiver.

- Employer Name: (Optional) Previous employer name.
- Employment Start Date: (Optional) Previous employment start date.
- Employment End Date: (Optional) Previous employment end date.
- Tax Withheld (Other Employer): Total ISR tax withheld from previous employer.
- Creditable Subsidy (Other Employer): Total creditable subsidy from the previous employer. Used in the calculation of Subsidy Proportion and reported in the Format 37.
- Non-Creditable Subsidy (Other Employer): Total non-creditable subsidy from the previous employer. Used in the calculation of Subsidy Proportion and reported in the Format 37.
- Total Earnings (Other Employer): Total earnings from the previous employer. Used in the Format 37 report.
- Exempt Earnings (Other Employer): Total exempt earnings from the previous employer. Used in the Format 37.

Mexico Employee Tax Signup (Mexico Only)

Some employees may decide to perform their own Format 37 reporting. In these cases, you need to mark them as exempt from annual tax adjustment processing. This EIT defines the individual employee eligibility for the Annual Tax Adjustment process.

- Annual Tax Adjustment: Defines if this employee is eligible for the Annual Tax Adjustment process. The default is Yes.
- Start Date: Start period of the employee's voluntary ineligibility.
- End Date: End period of the employee's voluntary ineligibility.

Employee Career Management Information

Records employee tracking information required for succession planning.

You can:

- Identify the advancement potential of an employee.
- Determine whether an employee is a key person in the enterprise.
- Identify whether an employee is at a high risk of vacating their current position.

NINO Verification Details (UK Only)

The Nino Verification Details person extra information type captures the RTI related data at the person level and records results of RTI processes. The NINO Verification reply message upload (NVREP) or the NI Number Verified pre RTI processes update all the data items in this EIT. You can also update this EIT manually as required.

Person Record Synchronization

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

- Full Name
- Last Name
- Date of Birth
- First Name
- Known As
- Marital Status
- Middle Names
- Nationality
- Gender
- Title
- Blood Type
- Correspondence Language
- Honors

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

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

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

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

> **Note:** You can only propagate changes to business groups in which your security profile allows you to make updates. When you terminate an employee using Oracle HRMS and the person type changes to Ex-employee, the employee's record in the HZ_PARTIES table remains at the Active status.

New Record Synchronization

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

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

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

Person Record Table

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

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

Field	UK Business Group
First Name	John
Middle Name	

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

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

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

Restrictions of Synchronization

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

Legislative Lookups

The application only propagates personal information across business groups for values selected from lookups if the lookup code exists in the target business group. For example, supposing a marital status is changed within a German business group for a

person that also exists in a UK business group. If the value chosen in the German business group is not applicable to the UK, then the UK marital status is not changed.

Character Sets

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

Future Dated Changes

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

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

Maintaining Synchronization

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

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

column of the report.

Automatic Transfer of Employees Between Business Groups

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

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

Person-Name Formats

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

Format Types

HRMS identifies the following format types:

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

Full Name

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

Display Name

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

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

List Name

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

Order Name

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

User-Defined Format Types

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

Stored Person Names

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

Local and Global Format Masks

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

- A local format is suitable for users in a single legislation who prefer to see person names in a character set appropriate to their legislation. For example, users in a Japanese enterprise would typically select a local format to see names displayed in a Japanese character set.

- A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

HRMS supplies both local and global versions of its Display Name and List Name format masks. (HRMS supplies only a local version of the Full Name format mask.)

When you create a new format mask, you identify it as either local or global. A format mask may reference different name components depending on whether the format is local or global.

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

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

The Supplied Format Masks

HRMS supplies the following format masks:

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

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

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

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

Creating or Editing Format Masks

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

For a new format mask, you specify the:

- Format Type

- User Format Choice (local or global)

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

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

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

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

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

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

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

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

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

Understanding Component Names

When you create or edit a person-name format, you select name components from a list of values. The names of some of the components in this list may come from the Further Person Information developer descriptive flexfield or the Additional Personal Details descriptive flexfield and are database-column names (for example,

PER_INFORMATION1 or ATTRIBUTE1) rather than column prompts. For example, the component PER_INFORMATION1 is the Maternal Last Name component for Mexico. To obtain the descriptive names of the name components, review the Further Person Information and Additional Personal Details flexfields for your localization. For each segment in the Segments Summary window, the value in the Window Prompt field identifies the information held in a particular component.

Determining Whether a Localization Stores Names in Global Formats

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

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

Migrating Stored Names to New and Revised Formats

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

See: Running the Update Person Names Program, page 2-48

How HRMS Selects a Format Mask

HRMS selects a format mask whenever you:

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

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

Full Name

1. Full Name format mask for the business-group legislation

2. PL/SQL procedure (PER_legcode_UTILITY.PER_legcode_FULL_NAME)

3. Supplied, null-legislation Full Name format mask

Global List Name

1. Global List Name format mask for the business-group legislation

2. Supplied, null-legislation, global List Name format mask

Local List Name

1. Local List Name format mask for the business-group legislation

2. Supplied, null-legislation, local List Name format mask

Global Display Name

1. Global Display Name format mask for the business-group legislation

2. Supplied, null-legislation, global Display Name format mask

Local Display Name

1. Local Display Name format mask for the business-group legislation

2. Supplied, null-legislation, local Display Name format mask

Order Name

1. Order Name format mask for the business-group legislation

2. PL/SQL procedure (PER_legcode_UTILITY.PER_legcode_ORDER_NAME)

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

Special Information Types

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

Examples include training records, disciplinary records, competence, and medical records. Oracle HRMS does not restrict you to any predefined format for holding this information. You can set up your own user-defined fields for recording, analyzing, and reporting on whatever special information you require.

In Oracle HRMS, you use the *Personal Analysis key flexfield* to define any special information not provided by the main system that you want to hold about people, jobs and positions, and training activities. Alternatively you can define Extra Information Types to record this information,

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

You can define any number of instances of the Personal Analysis key flexfield. Each instance is called a Special Information Type. For example, you might set up types to hold performance reviews or medical details. You can enter a person's information under these sorts of headings in the Special Information window.

Each Special Information Type can have up to thirty fields (where each field is a segment of the flexfield). You can set up cross-validation to ensure that users enter correct combinations of segments. You can also speed up data entry and minimize errors by defining an alias for common combinations of segment values.

When you enable special information types for your Business Group, you select how you plan to use each type. In Oracle Human Resources, you can use them for:

- Job requirements
- Position requirements
- Personal information

In Oracle Learning Management, you can use them for:

- Skills provided by training activities

Each Special Information Type can be used for one or more of these purposes. The options you select controls the windows in which each appears.

In Oracle Human Resources, you can also configure the windows that handle special information types to restrict them to just one Type, such as medical records. This is useful if you want to restrict access to particular types of information for security reasons, or to aid users' efficiency by giving them access to just the information they require for a particular task.

Finding a Person Using the Find Person Window

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

To query a person using the Find Person window:

1. Do one or a combination of the following:

   - Enter a full or partial query on the person's name. Where a prefix has been defined for the person, a full name query must be in the format 'Maddox, Miss Julie'.

   - Enter a full or partial query on the person's national identifier (such as social security number).

   - In the Search by number region, select a number type of employee, applicant, or contingent worker to enter your query on. Then enter a full or partial query on the number type selected.

2. Choose the Find button.

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

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

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

Entering a New Person (People Window)

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

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

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

To enter a new person:

1. Set your effective date to the appropriate date for adding the person to the

application. If you are entering an employee, this should be their hire date.

2. Enter the person's name and other details in the Name region. Only the last name is required for most legislations, but some legislations require a first name too.

   For UK users: The first name is a mandatory field. Ensure that the first character is an alphabet. The employee's last name is not a mandatory field, however, ensure that the first character is an alphabet.

   - In the Title field, select a title such as Mrs. or Doctor.

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

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

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

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

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

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

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

3. Select a gender, if required. In the US, you must choose Male, Female, or Unknown Gender. In the UK, you must enter the gender of each employee. For Poland, the PESEL you enter supplies the gender information. For Finland, the PIN (Personal Identification Number) supplies the gender information.

4. In the Action field, select an action type (such as Create Employment) and a person type. The person type you select displays immediately in the Person Type for Action field before you save it. If only one user person type exists for the action type, it displays automatically in the Person Type for Action field.

   Note: If you enter a contingent worker who has a previous person

type such as ex-employee, you can choose to revert the contingent worker back to the previous person type by using the Cancel Placement action.

If you are a Finnish user and need to pay salary to a contingent worker through Oracle payroll, you need to enter the person as an employee. You then change the person as a not employed person by changing the employee status in the Additional Assignment Details window. See: Entering Additional Assignment Details (Assignment Window), *Oracle HRMS for Finland Supplement (My Oracle Support Note: 283510.1)*

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

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

Entering Employee Information:

Enter the following information if the person is an employee.

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

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

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

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

Entering Identification Information:

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

1. If your enterprise uses a manual number generation scheme, enter an employee,

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

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

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

   > **Note:** If you are an Australian user, leave the National Identifier field blank. For Finland, the PIN (Personal Identification Number) supplies the values for gender, date of birth, and age.

Entering Personal Details:

Enter personal details in the Personal tabbed region.

1. Enter a date of birth. You must do this before you can assign an employee to a payroll. For Poland, the PESEL supplies the date of birth. For Finland, the PIN (Personal Identification Number) supplies the date of birth.

   For UK users only: If you have not entered the NI Number, the Date of Birth is a mandatory field.

2. Enter additional birth information into the Town of Birth, Region of Birth, and Country of Birth fields.

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

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

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

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

4. **For Finnish users only**: Enter the place of residence. The place of residence influences the regional membership. You use the place of residence and regional membership to calculate income tax and other statutory deductions.

5. If the Work Telephone field is displayed, enter a work telephone number. Otherwise, use the Phone Numbers window to enter this information.

6. In the Status field, select a marital status.

7. Select a nationality.

   For UAE users only: Nationality is recorded as additional personal information. Therefore, this field is not displayed in the Personal tabbed region.

8. **For Russian users only**: Enter the employee's statutory Pension Insurance Fund identifier. It is the employee's ID in the Statutory Pension Insurance Fund.

9. **For Russian and Swedish users only**: Select the person's citizenship. In Russia, you require this information for some statutory reporting to migration authorities. In Sweden, you can use this information to track persons who are not Swedish citizens, since the taxation and pension insurance schemes differ from those for Swedish citizens.

10. Select whether your employee, applicant or contingent worker is:

    - Registered disabled
    - Not registered disabled
    - Partially disabled
    - Fully disabled

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

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

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

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

12. **For Belgian users only**: enter the person's preferred correspondence language in

the Other region.

13. Save your work.

Multiple Person Records:

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

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

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

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

   Do one of the following four tasks:

   - If the person you are entering already exists, but in a different business group, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. If your application has person synchronization enabled, then the personal information entered for the new person is copied across to existing records in other business groups. If existing records have values for fields that the new record leaves blank, then these values appear in the new record. See: Person Record Synchronization, page 2-21

   - If the person already exists in your current business group then select that person from the list of values. The application retrieves the existing record and cancels the save you were trying to make, as one business group cannot contain two records for the same person. Close the new record and scroll down to display the existing record.

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

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

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

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

What Next?:

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

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

Entering Additional Personal Information (People Window)

Optionally, you can enter additional information for people in the tabbed regions of the People window described in the following steps.

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

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

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

To enter information for an applicant:

1. Choose the Applicant tabbed region.
2. If the applicant's resume is on file, check the Exists check box.

3. If the applicant's resume is on file, select the date indicating when the resume was last updated.

4. Select a final date a file is to be maintained for this applicant.

To enter background check information:

1. Choose the Background tabbed region.

2. Check whether the person background check has been performed.

3. Select the date the background check was performed.

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

1. Choose the Rehire tabbed region.

2. If the former manager has recommended the applicant for rehire, select the Recommended check box.

3. Select the reason for this recommendation.

To enter further name information:

1. Choose the Further Name tabbed region.

2. Enter one or more honors or degrees (BA, MBA, or JD, for example) that the person has earned.

3. Enter the name (perhaps a nickname) by which the person prefers to be known.

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

To enter medical information for a person:

1. Choose the Medical tabbed region.

2. Select the person's blood type.

3. Select the date of the person's last medical test.

4. Enter the name of the physician who performed this test.

To enter other information for a person:

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, page 2-171

- 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 People window.

> **Important:** The HR 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.

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

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

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

   Date of death defaults to the person's termination date if:

   - In the Terminate window you enter the termination reason of deceased, but

- You do not provide the actual termination date, and
- You have not yet entered a date of death

6. Select the current student status, if the person is a student.
7. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.
8. Check the Military Service check box if the person is employed in a military service.

   The value of this field can impact benefits calculations.
9. Check the Second Passport Exists check box if the person possesses multiple passports.

To enter benefits information:

1. Choose the Benefits tabbed region.

   Note: All fields in the Benefits tabbed region are optional. Most can help to determine plan eligibility or rates.

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

2. Enter a benefit group for your employee or applicant. Benefit groups help determine a person's eligibility for a plan or set benefit rates. For example, benefit groups can address mergers and acquisitions where eligibility is complicated, or assist in grandfathering a person into a very old plan.
3. Enter what kind of tobacco (cigarettes, pipe, cigar, or chewing, for example) your employee uses, if any.
4. Enter the medical plan number, which is the policy or group plan number of an externally provided medical plan.
5. Enter the adoption date, if the employee has adopted a child. This information, with the child's date of birth, can determine dependent eligibility. You can enter the adoption date only if you have entered a date of birth for the person. The adoption date must be the date of birth or later.
6. Enter the date you received the death certificate of a deceased employee. You can

enter this only after you have entered the date of death in the Other Information region. The receipt of the death certificate must be after or equal to the date of death.

7. Enter an adjusted service date for your employee. Benefits can use this date, rather than the date first hired, to determine the length of service for eligibility, enrollment, and rates. The adjusted service date can credit service for former employers, grandfathered benefits, or in the case of mergers and acquisitions.

8. Change the date first hired. For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of the employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.

9. Check the Other Coverage check box, if the employee or applicant has externally provided coverage.

10. Check the Voluntary Service check box, if your employee or applicant is volunteering, for example as a missionary.

Entering Pictures

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

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

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

You enter pictures in Oracle HRMS in the Picture page.

To enter a person's picture in Oracle HRMS:

1. In the Picture page, enter the file path or click Browse to locate the directory in which you saved the graphic file

2. Highlight the filename and click Open. The selected file is loaded and displayed in the Picture page.

Entering and Maintaining Documents of Record

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

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

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

> **Note:** The Documents of Record functionality is also available from SSHR.
>
> See: Documents of Record, *Oracle SSHR Deploy Self-Service Capability Guide*

To search for documents of record:

1. Select Search Documents of Record from the Navigator.

2. Enter your search criteria.

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

3. Click Go to perform the search.

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

To create or maintain documents of record for an individual:

1. Either display the person record in the People window and select Documents of

Record from the list of navigation options, or select Documents of Record from the FastPath menu and search for a person.

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

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

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

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

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

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

   The Create Document of Record page appears.

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

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

5. Close the window.

Running the Person Synchronization Report

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

Run the Person Synchronization report in the Submit Requests window.

To run the Person Synchronization report:

1. Select the Person Synchronization report in the name field.

2. Click in the Parameters field to display the Parameters window, if it does not automatically open.

3. Enter the date upon which you want to run the report. The default is the current system date.

4. Select a person for whom to run the report or leave blank to run for all people in your business groups who are also in another business group.

5. Choose OK to run the report. You can view the results from the Requests window.

Setting Up Special Information

To set up Special Information Types:

1. Define each Special Information Type as an instance of the Personal Analysis key flexfield.

2. Enable the Special Information Types you want to use in your Business Group and select how you want to use them.

   See: Enabling Special Information Types, page 2-47

   #### Oracle HR Only

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

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

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

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

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

   3. Design your navigation menus, including the List People by Special Information window (or your configured versions of it) and the personal information task flows.

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

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

      See: Skills Matching Report, page 3-48

Entering Special Information

Basic personal information is handled in a fairly standard way from enterprise to enterprise. However, other types of information are recorded and used in quite

different ways. Examples include training records, disciplinary records and medical records. Enter this type of information in the Special Information window.

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

To enter special information for a person:

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

Enabling Special Information Types

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

To enable Special Information Types:

1. Select the special information types you want to use in your Business Group.
2. Enable each type by checking the Enabled check box.
3. Check the other boxes to specify how you plan to use the special information type. This makes it available in the list of values in other windows as follows:
   - **Job**: in the Job Requirements window
   - **Position**: in the Position Requirements window
   - **Other**: in the Special Information window
   - **Skill**: in the Skill Provisions and Search for Event windows in Oracle Training Administration

   The OSHA and ADA check boxes are for US users only.

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

If you mistakenly save information in the People window, you can remove the person by selecting Delete Record from the Edit menu. You are prevented from performing this

action if you have entered information about that person in other windows.

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

Contacts

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

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

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

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

To delete all records of a person:

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

Running the Update Person Names Program

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

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

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

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

To run the Update Person Names program:

1. In the Name field, select Update Person Names.

   The Parameters window opens.

2. Select a Format Type value.

3. Select a legislation. HRMS updates person names of the specified format type defined in business groups that have this legislation code. If you select no legislation, HRMS updates person names in all business groups.

4. Set Disable WHO Trigger to Yes or No.

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

   - LAST_UPDATE_DATE
   - LAST_UPDATED_BY
   - LAST_UPDATE_LOGIN

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

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

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

5. Click Submit.

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

Contracts

Contracts

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

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

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

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

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

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

- A contract cannot exist without a person. Therefore, if a person who has a contract attached to them is deleted, the contract will also be deleted.

- Contract statuses are set up depending on the needs of your enterprise. If you have any queries about contract statuses, please contact your system administrator.

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

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

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

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

Creating Contract Statuses

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

To create contract statuses:

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

Use the Application Utilities Lookups Window to create contract statuses for the Lookup type CONTRACT_STATUS.

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

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

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

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

Assigning Contract Types

Use the Extra Details of Service window to assign contract types to your employees.

To assign a contract type:

1. Select the contract type in the Contract Type field.
2. Enter a start date for the contract.

3. Save your work.

   If you subsequently change the contract on the contract types table, you can run a concurrent process for an assignment set to update FTE for a large number of assignments.

   See: Running the Calculate FTE for Assignments Process, page 2-60

Entering Contract Types

You enter and maintain values for the user defined Contract Types table in the Table Structure and Table Values windows. The historic rates function uses this information to convert values held for one time dimension to another dimension.

> **Note:** The system administrator can create configured versions of the Table Values window so that you use each version for one user table only.

To create contract types:

1. In the Table Structure window, set your effective date to the date from which you want the entries to take effect.
2. Query the table name 'PQP_CONTRACT_TYPES'.
3. Choose the Rows button.
4. Enter the contract name in the Exact field.
5. Click in the next row and enter your next contract name. Repeat this step until you have entered the names of all the contract types you require.

   > **Note:** For historic rates: If you hold rates on input values and use the Period Divisor on the Contract Types table to convert the period value to an annual value (that is, Time Dimension = Periodic on the Element Attribution Information for your elements), you must create at least one contract type for each payroll frequency. For example, employees on a weekly payroll must be assigned to a separate contract type from employees on a monthly payroll. This does not apply if you select the Time Dimension *Periodic - Payroll Frequency*, which uses the Weekly or Monthly Payroll Divisor held on the Contract Types table to convert period values to annual.

6. Save your work.

To enter values for the contract types:

1. In the Table Values window, set your effective date to the date from which you want the entries to take effect.

2. Query the table name 'PQP_CONTRACT_TYPES'.

3. With the cursor in the Column Name field, use the up and down arrows to locate the name of the column in which you want to make entries. The columns are as follows:

   - Annual Hours--This is the number of hours worked per year under this contract. It is used to convert rates to hourly rates.

   - Days Divisor--This is the number of days worked in a year under this contract. It is used to convert rates to daily rates.

   - Period Divisor--The number of periods in a year (12 for monthly, 52 for weekly, and so on). This divisor should always correspond to the time dimension you use to express working hours on the Assignment window. For example, if you state weekly working hours, enter 52 as the Period Divisor.

   - Weekly Payroll Divisor--This is the number of periods per year used to convert a periodic value into an annual value when you select *Periodic - Payroll Frequency* as the time dimension for the element and the employee has a payroll frequency of Weekly, or Bi-Weekly.

   - Monthly Payroll Divisor--This is the number of periods per year used to convert a periodic value into an annual value when you select *Periodic - Payroll Frequency* as the time dimension for the element and the employee has a payroll frequency of Calendar Month, Lunar Month, Bi-Month, Quarter, Semi-Year, or Year.

   - Overtime Annual Hours--The number of overtime hours per year, used to calculate overtime hourly rates.

   - Annual Term Time Hours--Used to adjust a derived rate by a factor of Annual Term Time Hours divided by Annual Hours.

   - Service History Band 1 Adjustment Factor--The percentage by with the derived rate is incremented for employees in Band 1.

   - Service History Band 1 Lower Limit--The minimum number of years service required to qualify for the Band 1 adjustment factor.

   - Service History Band 1 Upper Limit--The maximum number of years service applicable to Band 1.

You can define up to four further service history bands.

4. In the Values region and the Exact field, select each row for which you want to make an entry.

5. For each row, make the appropriate entry in the Value field.

6. Save your work.

Defining Contract Letter Types

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

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

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

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

To define a contract letter type:

1. Enter a name for the letter.

2. Select the Concurrent Program Name assigned by your System Administrator to the SQL*Plus script.

3. Save your contract letter type.

Entering Contracts

You enter and maintain contracts in the Contracts window.

To enter a new contract:

1. Set your effective date to the start date of the contract.

2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract

reference code.

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

   See: Creating Contract Statuses, page 2-51

4. Select the contract type.

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

   Note: The document status is not DateTracked.

6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.

7. Enter further information about this contract if your Oracle localization team has set up the Further Contract Information window.

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

8. Save your changes.

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

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

Maintaining Contracts

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

- If you change the status of an active contract to make it inactive, and choose the Update button, the contract record will be ended. A new contract record with an inactive status will be created and the fields in the Active Contracts Dates region will become blank.

- If you change the status of an active contract to make it inactive and choose the Correction button, the current contract record will be amended to appear as if the most recent active period has never occurred.

Deleting Contracts

If you mistakenly save information in the Contracts window you can delete it. You

cannot perform this action if the contract is referenced by an assignment.

Note: Contracts cannot be date effectively end dated.

To delete a contract:

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

Managing Contracts

The Manage Contracts folder enables you to:

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

Find Contracts

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

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

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

To find contracts:

1. Enter a full or partial query on one, a selection, or all of the available person information:
2. Select whether to find people either with or without a contract. Leave blank to find

people with and without contracts.

3. Enter full or partial queries on contract and assignment details using the tabbed regions.

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

   > **Note:** You can generate contracts for a person's assignment that is not covered by a contract. See: Generating and Printing Contracts, page 2-58

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

Manage Contracts

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

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

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

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

To mass update the document status of contracts:

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

   > **Note:** You set up document statuses in the Contracts window using the Lookup Type DOCUMENT_STATUS.

4. Choose OK.

   The selected contracts are updated with the new document status.

Generating and Printing Contracts

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

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

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

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

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

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

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

To select an assignment:

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

To generate a contract:

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

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

4. Choose OK.

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

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

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

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

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

Setting Up Full Time Equivalent

Follow these steps if you want to set up the Full Time Equivalent (FTE) function.

To set up Full Time Equivalent:

1. Create Contract Types. Go to the Table Structures window and query up the seeded user defined table PQP_CONTRACT_TYPES. Add one row for each new contract you want to set up.

   Note: Create at least one contract type for each payroll frequency. For example, weekly employees must be assigned to a separate contract from monthly employees.

2. Then go to the Tables Values window and enter the appropriate column values for each contract type.

See: Entering Contract Types, page 2-52

3. Assign people to contract types using the Extra Details of Service window.

4. On the Assignment window, enter the Working Hours and Frequency for your employees on the Standard Conditions tab. The FTE function will not work unless you do this. The Frequency should match the period divisor set up on the contract type assigned to the employee.

   For example, if an employee is assigned to a contract type where annual hours are 1920 and the period divisor is 12, Working Hours must be 160 and the Frequency is monthly. You calculate Working Hours as annual hours divided by period divisor.

5. If you subsequently change the contract on the contract types table, run the concurrent process for an assignment set to update FTE for a large number of assignments.

   See: Running the Calculate FTE for Assignments Process, page 2-60

Running the Calculate FTE for Assignments Process

Run the Calculate FTE for Assignments process in the Submit Requests window to calculate FTE for part time employees. Use this process to update records after you change contract hours on the contract types table.

To run the Calculate FTE for Assignments Process:

1. Select Calculate FTE for Assignments in the Name field.

2. Select the type if the process is being run for a single contract type, in the Parameters window.

3. Select the Payroll for which you want to run the process in the Payroll field.

4. Enter the effective date for which you want to run the process.

   Note: If there are any future dated changes to the contract type or standard hours after the effective date you select, they will be lost.

5. Select the OK button to close the Parameters window.

6. Choose the Submit button.

Employees

The Employee Assignment

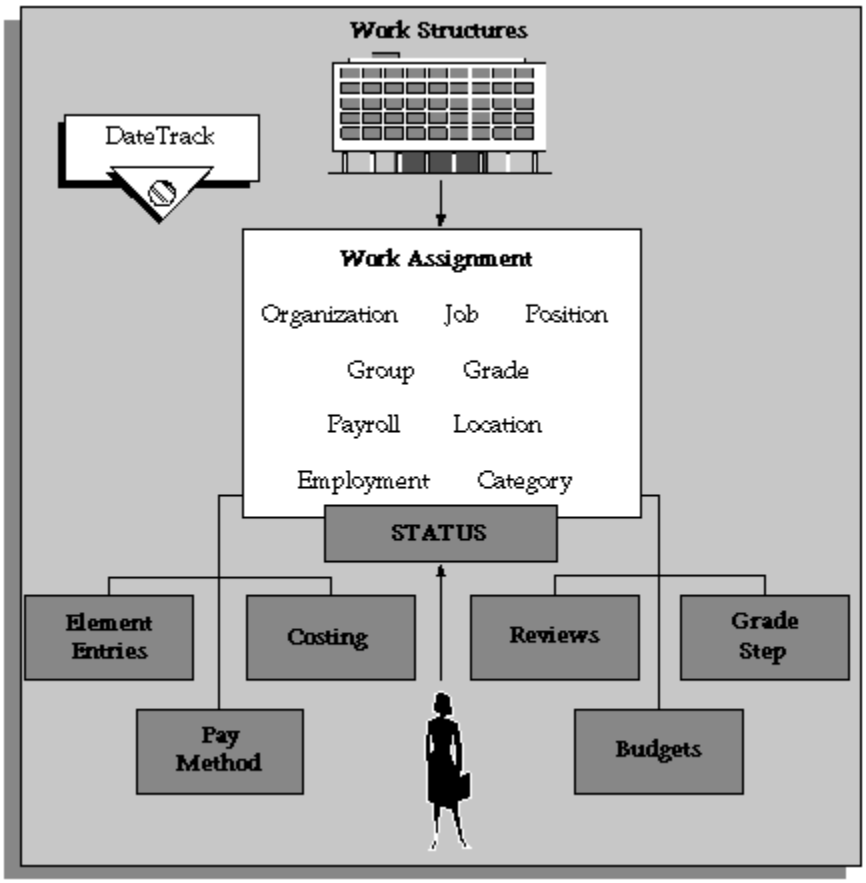
The assignment is the central concept that relates employees to the structures in which they work, and the compensation and benefits for which they are eligible.

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

For example, if an employee has more than one role within your enterprise, he or she can have a separate assignment for each role.

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

Employee Assignment



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

Components of the Assignment

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

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

Mexico only: HRMS also uses the assignment to associate employees to their Social

Security GRE.

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

You can assign employees to a *salary basis* and maintain their salaries or wages using the Salary Administration procedure. See: Salary Administration Overview, *Oracle HRMS Compensation and Benefits Management Guide*

Multiple Assignments

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

Relocations, transfers, promotions and so on go on record as datetracked changes to employees' existing assignments. You do not enter new assignments for changes like these.

Managing Multiple Assignments

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

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

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

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

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

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

Managing Changes in Assignment Information

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

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

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

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

Mass Assignment Update

When an organization changes its business rules, it is often necessary to update a large amount of employee assignment information. The mass assignment update process can now be managed by one window.

The Mass Assignment Update feature enables you to:

- Alter employee assignment information for past, present or future dates within a Business Group.
- Define search criteria to match the type of employee your organization needs to update.
- Add further information updates to individual employees.
- Filter assignment change information using folder forms.

The Mass Assignment Update feature gives your organization more control over which employees are updated, and when the employees are updated.

Effects of Changing an Assignment

Changing any assignment component can have the following effects:

- The employee may lose eligibility for some compensation types, benefits or deductions, and gain eligibility for others. You receive a warning that the system automatically ends any unprocessed element entries for which the employee is no longer eligible.

- The employee may have a different level of access to Oracle HRMS, since the system's security is based on assignment to work structures.

- If you change the employee's grade when a grade step placement exists for the assignment, you receive a warning message that the placement will be date effectively ended and any future placements will be deleted. Also, the special ceiling point field is cleared.

- **Mexico only**: Changing assignments may result in a change of GRE. In this case, you must justify the separation to the Social Security agencies. Document a Social Security Leaving Reason in the Social Security Affiliation tabbed region of the Assignment window.

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

Ending Assignments and Terminating Employees

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

For employees with more than one assignment, you can end all but one of their assignments by selecting an assignment status of End or Terminate in the Assignment window. At sites using Oracle Payroll, the choice of End or Terminate controls the ability to include the assignment in a payroll run after the date the assignment ends. Sites not using Oracle Payroll can use these two statuses to provide information. For example, End may mean that further pay processing cannot occur for the assignment, while Terminate may mean that further processing can occur. Alternatively, these sites can simply use the status End.

Accessing Ex-Employee and Future-Dated Employee Records

Oracle HRMS provides the HR: Access Non-Current Employee Data profile option to enable access to ex-employee and future-dated employee records. You can enable this profile option for HR users to:

- Access ex-employee records, for example, to manage retirement benefits.

- Update future-dated records.

Oracle HRMS displays only those ex-employees who do not have future-dated records as of the system date. For example, you terminate an employee as on January 31st, 2007 and rehire the person as on March 1st, 2007. When you search for this person's record, as of the system date of February 15th Oracle HRMS will not display the ex-employee's record because a future-dated record exists for the ex-employee.

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

Employment Information

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

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

- Where a change affects a group, you can effect that change for every individual in the group according to a set of rules.

- Where a change affects only a few individuals, you can enter changes for just those individuals.

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

- The assignment connects employees to your enterprise's work structures and policies, so that changes to the structures and policies are reflected in the employee's records.

- You can query groups of employees with similar assignments (such as all assignments on grade C2) and make changes for each employee in these groups.

Also, Oracle HRMS provides a number of predefined inquiry windows and reports for employment information. You can create your own inquires and reports using QuickPaint or other reporting tools.

For more information see: Information Access, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Summary of Employment Information

The following table shows the employment information typically held for an employee in Oracle HRMS and how you enter it.

Employment information summary table:

Employment Information	Method of Entering
Job Title or Position	Assign the employee to work structures in the Assignment window.
Department	
Location	
Grade	
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Name of manager or position to report to	Use a position hierarchy or enter the supervisor`s name in the Assignment window.
Salary	Assign to a salary basis in the Assignment window; enter amount in the Salary Administration window.
Benefits	Enroll the employee in a Flex Program, Non-flex Program, Savings Plan, or Miscellaneous Plan.
Pay Frequency	Assign to a payroll in the Assignment window.
Pay Method	Accept the default from the Payroll to which the employee is assigned or select a method in the Personal Payment Method window.
Full time/part time status	Assign to an employment category.
Standard Work Day	Enter in the Assignment window or accept the default from the organization or position to which the employee is assigned.
Overtime rules	Define an element, using links to define eligibility rules, and element entry defaults or validation to control the values given.

Employment Information	Method of Entering
Vacation Entitlement	Define absence types and set up increasing or decreasing balances for the employee; enroll employee in appropriate accrual plans.
Sickness Entitlement	
Maternity Entitlement	
Notice Period	You should hold full text procedures and regulations outside the system. You can associate groups of people with different rules or procedures using the People Group key flexfield.
Disciplinary procedure	
Costing	Enter cost codes for the assignment in the Costing window, or accept the default from the organization to which the employee is assigned.
Probation Period	Enter in the Assignment window.
Collective Agreement	Enter a collective agreement in the Collective Agreements window and then select it in the Assignment window.
Collective Agreement Grades	Link the collective agreement to a grade structure and enter reference grades for it in the Agreement Grades window. Then, select the grade structure in the Assignment window and enter a combination of valid grade factors for it.
Supplementary Roles	Enter supplementary roles in the Supplementary Roles window.

Employment History

The employment history is a record of an employee's previous periods of service for a different employer. Employers sometimes use these previous periods of employment to calculate an employee's current benefits, for example, the leave or sick pay entitlement.

You can include employment history when calculating pay from published pay rates to which service awards apply. You can also apply historic rates and proration to these calculations.

With the Employment History functionality, you can enter an employee's previous periods of employment and also store information on the previous employers if required.A decriptive flexfield has been added, which enables you to add additional details about the employee's service history if required.

It is important to be able to calculate the duration of the previous employment periods since this can affect an employee's current benefits. The Employment History functionality offers you two solutions: you can either enter the duration manually in years and days or you can specify that the system should calculate the duration automatically.

Not all periods of employment may be eligible for inclusion in the continuous service calculation. With the Employment History form, you can mark individual employment periods as relevant for the continuous service calculation. In addition, you can specify that particular employment periods are relevant for all assignments.

Working Shift Patterns

You can use Oracle payroll to store records that define shifts and combinations of shifts. You can also assign these shift details to an employee and use them to calculate the hours worked between two dates.

Shifts and Shift Patterns

You can store information about:

- Shifts - a shift is a unit of work representing one attendance at the place of employment. For example, if your employee is contracted to work 8 hours in one day, this is the daily shift.
- Shift patterns - a shift pattern is a sequence of consecutive shifts

A Shift Pattern of Five Days

Day	Hours Worked
Day 01	8
Day 02	8
Day 03	5
Day 04	8

You can create a shift pattern of up to 28 days, and you can specify the number of shift hours to be worked on each day within the shift pattern.

How Oracle Payroll Represents Shift Patterns

Oracle Payroll stores shift patterns in the user defined table PQP_COMPANY_WORK_PATTERNS. You can modify existing patterns and add new ones.

You can apply shift patterns to an employee assignment and then calculate the hours worked within a given period.

Entering Employment History

You use the Employment History window to enter information on an employee's previous periods of service for other employers. You can also specify whether individual periods are eligible for inclusion in the calculation of the continuous service period and whether they are relevant for all assignments.

To enter employment history for an employee:

1. Choose Others and then Employment History from the Assignment window.
2. Enter the employer's name and address.
3. Select the employer type and subtype, if known.
4. Enter the start and end dates for the employment period.
5. You can either enter the length of the employment period manually or let the system calculate the length automatically. To enter the length manually, enter the number of years and days.

   Note: If you do not enter the length of employment period manually in the given fields, a message is displayed asking whether you want the system to calculate the length of the employment period automatically. This message appears when you save the Employment History form. If you do not choose to enter the length of the employment period manually and do not choose automatic calculation, the fields remain blank.

6. Enter a descriptive text for the service period, if necessary.

7. Use the Further Information flexfield to enter additional details about the employee's employment history.

8. Select the appropriate checkbox to specify that the service period is included in the calculation of continuous service or that it is taken into account for all assignments. You can select one, both, or none of the checkboxes.

9. Save the form.

Entering Payment Methods for an Employee Assignment

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

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

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

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

To enter payment methods for an employee assignment you must:

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

To enter a personal payment method for remuneration:

1. Set your effective date to the date on which to begin paying the employee by this method.

2. In the Name field, select a payment method.

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

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

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

5. If the payment method type is BACS, open the Bank Details window for entry of information about the employee's bank account. You must enter the Sort Code, Bank Name, Account Name and Account Number. You may enter additional information such as Bank Branch, Bank Branch Location and Building Society Account Number. When you have entered these details you can then supply the further information shown in the Further Payment Method Information window. As a minimum, you must enter the BACS User Number and the BACS Limit.

To enter a third party payment method:

1. Set your effective date to the date on which to begin making payments using this method.

2. In the Name field, select a third party payment method.

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

3. In the Payee region, select an organization or a person.

4. Save your work.

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

Entering Previous Employment Details

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

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

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

To enter previous employment details:

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

   For Hungarian users only If the employee joined your enterprise mid-year, specify the number of sickness days they have already taken with their previous employer. You can use this information in an accrual plan to calculate their sickness entitlement for the rest of the year.
10. Select the All Assignments check box to specify that the service period is taken into account for all assignments.

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

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

    See: Person Extra Information Types, page 2-17

To enter previous job details:

1. Select an empty row in the Previous Job region or place you cursor within an existing row and choose the New button to add a new row.

2. Enter start and end dates for the previous job. The job entered must be associated with the employer and period of service entered at steps 1 to 11. The dates entered automatically calculate the period of service in years, months and days.

3. Enter a job title.

4. Select an employee category.

5. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.

6. Enter a description for the previous job.

7. Select the All Assignments check box to specify that the previous job period is taken into account for all assignments.

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

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

   See: Entering Further Previous Job Information.

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

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

10. Save your work.

To map previous jobs to an assignment:

1. Select an empty row in the Assignment region or place you cursor within an existing row and choose the New button to add a new row.

2. Select an assignment to map to a previous job specified in the To enter previous job details section.

3. Select a job to map to the assignment. Selecting a job automatically displays the Start Date and End Date fields as specified for the job in the Previous Job region.

4. You can override the period of service calculation by entering your own period of

service in the Years, Months and Days fields.

5. Use the Further Information flexfield to enter further previous job usage details.

6. Save your work.

Student Employees

Student Employees Overview

In some legislations, students may follow a work-study program, where the work component meets some or all of the costs of the study component. Typically, the government or the educational institution the student attends partially or wholly funds the student's employment. In the U.S., for example, federal work-study funds can pay for the student's employment in community service, America Reads, or America Counts programs. In HRMS, students enrolled in work-study programs are referred to as *student employees*.

Student Employees in Oracle HRMS

The Oracle Student System (OSS) component of Oracle's E-Business Suite is the primary tool for the management of student data, such as admission, enrollment, and fee information. You create student employee records in Oracle HRMS so that you can include student employees in your payroll.

Student employees may be liable for selected taxes. For example, student employees in the U.S. are usually exempt from FICA (Medicare and Social Security) contributions but liable for other federal and state taxation.

Some integration tasks are necessary before you can create student employee records.

See: Setting Up Integration of OSS and HRMS, page 2-80

Creating Student Employee Records

To create a student employee record in HRMS, you use the HRMS Enter and Maintain Student Employee function. This function extracts student details from OSS, which you can amend before storing them in HRMS. To create multiple student employee records, you can use the Enter and Maintain Student Employee interface. Alternatively, you can download data extracted from OSS to a spreadsheet, update the data if necessary, and upload the spreadsheet contents to HRMS. (HRMS flags errors in the spreadsheet.) The latter approach, which uses the Web ADI function, is most useful for creating several (for example, more than ten) records.

For each student employee, HRMS creates a person record of system type Employee and user type Student Employee. (You define the user type and can use a different name.)

When HRMS Records Already Exist

Before creating a student employee record, HRMS compares the following values, in the

following order, with those in existing person records:

1. Trading Community Architecture (TCA) party ID
2. National identifier
3. The combination of last name, first name, and date of birth

If any of these items produces a match, HRMS displays the person's record as a potential duplicate record. You can either indicate that there is no match, or update the existing record. If you update the existing record and the person is currently:

An applicant or ex-applicant	HRMS converts the person to an employee.
An ex-employee	HRMS rehires the person as an employee.
An ex-contingent worker	HRMS hires the person as an employee.
A contact	HRMS creates a new employee record.
A student employee	HRMS updates the record with any changes you enter.
A regular employee	HRMS updates the record to include the student employee assignment.
A contingent worker	HRMS raises an error. An individual cannot be both an employee and a contingent worker.

> **Note:** If HRMS displays existing **applicant** records for the person that do **not** relate to their work-study program, you must create an applicant record for their work-study employment (using the HRMS professional user interface) and convert it to a student employee record using the Enter and Maintain Student Employee function.

Before converting an existing record to a student employee record, HRMS prompts you to confirm the action. By default, the hire date for new student employees is the effective date. You can change this date before uploading records to HRMS.

Oracle Student System (OSS) Person Details EIT

When HRMS creates a student employee record, the application also creates an Oracle Student System (OSS) Person Details Extra Information Type (EIT). The segments of this EIT, which HRMS populates, are:

- OSS Person Type, which is the person type (for example, student) recorded in OSS
- OSS Person Number, which is the student's TCA Party ID
- Alternate ID Type and Number, which record other identification values (such as national identifier) used by OSS
- Synchronize OSS Data, which controls automatic synchronization of the student's address and telephone number between HRMS and OSS. This segment is set to Yes by default.

See: Maintaining Student Employee Data, page 2-78

See: Person Extra Information Types, page 2-17

Address Styles

Address structures in OSS are different from those in HRMS, which are specific to the legislation. HRMS uses the country value from the student's primary address in OSS to identify the appropriate local address style. If the local address style is not installed, then HRMS uses the global address style for that country.

Maintaining Student Employee Records in HRMS

The integration of HRMS with OSS simplifies not only the creation of student employee records but also the maintenance of common student employee data.

See: Maintaining Student Employee Data, page 2-78

Maintaining Student Employee Data

You create student employee records in HRMS using data extracted from Oracle Student System (OSS). To help you maintain student records, HRMS can copy automatically to OSS any change you make to common data (data that appears in both HRMS and OSS student records). Currently, this synchronization does not occur from OSS to HRMS; therefore, Oracle recommends that you maintain your student employee records in HRMS.

> **Note:** You can use the Enter and Maintain Student Employee interface, which is designed for student employee data, for both the creation and maintenance of student employee records. Alternatively, you can use the People window and People Management templates to update student employee records.

How Data Synchronization Occurs

A student's personal information, including name, gender, address, telephone number, national identifier, and passport and visa details, is common to HRMS and OSS. The synchronization of common data between HRMS and OSS is controlled by:

- The HZ: Protect HR Person Information profile option.

  This profile option controls the synchronization of common data. The profile option is set to No by default, which *enables* data synchronization between HRMS and OSS. If you set this option to Yes, no data synchronization occurs. This profile option applies to all student employees.

  > **Note:** Synchronization of national identifiers between HRMS and OSS does not occur, regardless of the profile option setting.

- The Synchronize OSS Data field in the person EIT (Oracle Student System (OSS) Person Details) for student employees.

  This field determines whether synchronization of the student employee's address and telephone information occurs. HRMS holds a telephone number as a single value, whereas OSS holds it as multiple values (country code, area code, subscriber telephone number, and so on). To prevent HRMS using the complete telephone number to update the subscriber telephone number field in OSS, you can set Synchronize OSS Data to No. This setting prevents synchronization of changes to a student's address and telephone number, but does not affect the synchronization of other person information controlled by the HZ: Protect HR Person Information profile option.

  > **Note:** If you receive the error message "Please enter valid address elements: COUNTY, CITY" when attempting to update the city and county values in an HRMS student employee record when address synchronization with OSS is enabled, do one of the following:
  >
  > - Disable synchronization of changes to the student employee's address and telephone information by setting Synchronize OSS Data to No.
  >
  >   In this case, you must apply the changes manually to both the HRMS and OSS records.
  >
  > - Set the profile option HZ: Address Validation Level for Application to "No Validation".

When a Student Employee's Status Changes

HRMS and OSS do not automatically share changes to a student employee's status:

- A student who ceases to be a student in OSS remains a student employee in HRMS until you manually terminate their employment.
- A student whose employment you terminate becomes an ex-employee in HRMS; however, HRMS does not communicate this change to OSS.

Identifying Differences Between HRMS and OSS Student Records

Oracle HRMS provides a Student Employee Comparison Report, which you can run periodically, that identifies differences between the versions of common data held by HRMS and OSS. To run this report, select the Comparison Report function from the Student Employee menu.

Using the information in the report, you can correct inconsistencies between HRMS and OSS student records. To take advantage of automatic data synchronization, make your corrections in HRMS.

Setting Up Integration of OSS and HRMS

1. To create student employee records in HRMS, you use the Enter and Maintain Student Employee function. To run the Student Employee Comparison Report, you use the Comparison Report function. These functions are available in the Student Employee menu in menus associated with the standard responsibilities (for example, US HRMS Manager). If necessary, add these functions to the menus of other authorized users.

2. For creation and update of multiple student employee records, you can use standard Web ADI functionality. Ensure that relevant users have access to Web ADI and that you have configured WEB ADI correctly.

   See: Implementing Web ADI for use with Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Define the user person type Student Employee for the system person type Employee. You can use a different user person type name; however, the term "student employee" appears in documentation and in the user interface.

   See: Defining Person Types, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

4. In the U.S., exclude students from EEO and related reports that include employees with particular employment categories:

- Define a new employment category for student employees in the lookup EMP_CAT.
- Do **not** register the new category as a reporting category for the business group.

  Note: Assigning a new employment category to student employees does not exclude them from New Hire reports.

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

5. The profile option HZ: Protect HR Person Information controls data synchronization between HRMS and OSS. By default, HZ: Protect HR Person Information is set to No, which means data synchronization is enabled. If you set the option to Yes, data synchronization between OSS and HRMS does not occur.

   See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide* and Maintaining Student Employee Data , page 2-78

6. If appropriate, define grades, jobs, and positions for student employees, and add segments to the People Group flexfield for student employee information. Such definitions can help you manage student employee records.

   See: Defining a Job, *Oracle HRMS Enterprise and Workforce Management Guide*, Defining a Position, *Oracle HRMS Enterprise and Workforce Management Guide*, Defining a Grade, *Oracle HRMS Compensation and Benefits Management Guide*, and User Definable Key Flexfields, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   When you create student employees in HRMS, be sure to select any employment categories, jobs, positions, and grades you have defined for them.

Contingent Workers

Contingent Workers

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

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

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

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

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

Entering Contingent Workers

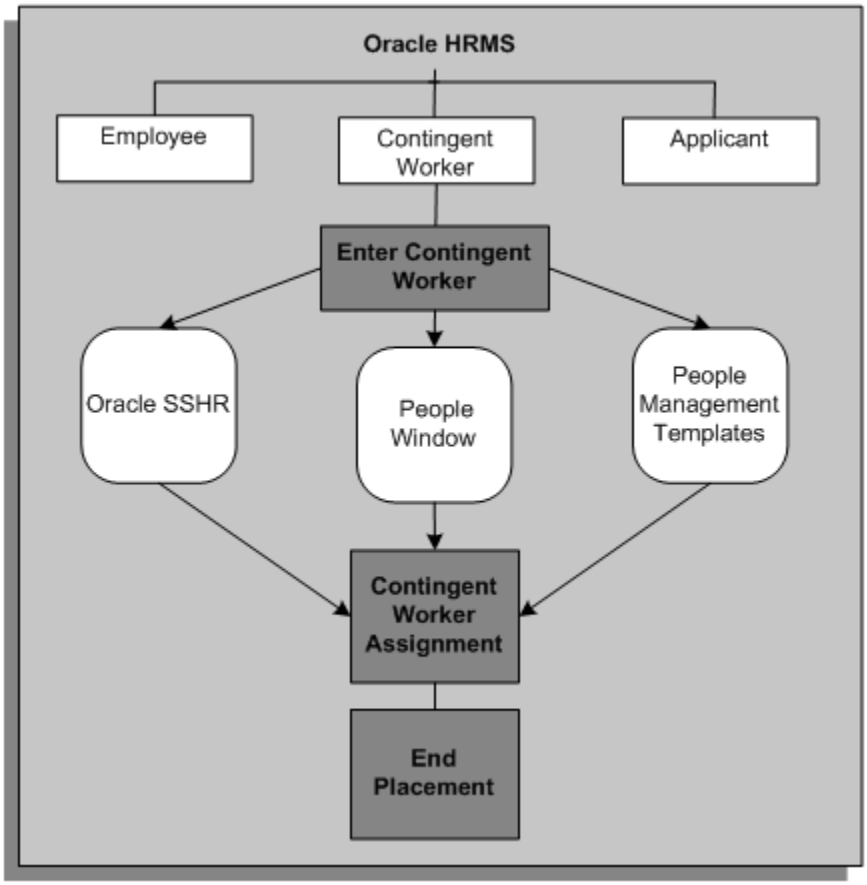
Every enterprise must be able to enter and hold personal information for its workforce. You can enter personal information for contingent workers using the People window or the People Management templates.

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

Contingent Worker Support in Oracle SSHR

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

Contingent Worker



The Contingent Worker Assignment

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

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

Period of Placement

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

Assignment Rate Types and Assignment Rates

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

> **Note:** Oracle Services Procurement enables you to associate more than one purchase order or purchase order line to a contingent worker. If the task flow to use the PO_CWK_ASSOCIATIONS function is enabled, then you can use the Associate Purchase Order with Contingent Worker page to associate more than one purchase order or purchase order line to a contingent worker. For more information, see: *Oracle Procurement - Services Procurement White Paper* on My Oracle Support, Note ID 567411.1

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

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

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

Ending a Placement or Assignment

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

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

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

Canceling a Placement

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

Separating Contingent Workers from Employees Using Oracle HRMS

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

Contingent Worker Person Types

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

Contingent Workers and Oracle HRMS Security

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

CustomForm

Many of the windows used in Oracle HRMS are multipurpose windows. For example, the People window can be used to enter and maintain personal details for employees, contingent workers, and applicants. You can create a separate version of some Oracle HRMS windows to cater specifically for contingent workers using *CustomForm*. For example, you could create your own version of the People window to cater solely for contingent workers.

Task Flow

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

Combining Security Profiles, CustomForm, and Task Flow

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

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

The Contingent Worker Assignment

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

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

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

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

Components of the Assignment

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

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

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

Multiple Assignments

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

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

changes.

Managing Multiple Assignments

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

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

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

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

Managing Changes in Assignment Information

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

- If you choose *Correction*, Oracle HRMS overwrites the existing assignment information back to the last effective from date.

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

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

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

Ending Assignments and Terminating Contingent Workers

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

If a contingent worker has more than one assignment, you can end all but one of their

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

Contingent Worker Suppliers

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

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

Defining Suppliers

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

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

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

Defining a Combination of Assignment Rate Type and Basis

Use the Assignment Rate Types window to associate an assignment rate type with a

rate basis for contingent workers.

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

To define a combination of assignment rate type and basis:

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

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

4. Save your work.

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

   See: Entering Assignment Rates for Contingent Worker Assignments, page 2-89

Entering Assignment Rates for Contingent Worker Assignments

> **Note:** This procedure applies only if you are **not** using Oracle Services Procurement to provide purchase order information for contingent workers.
>
> If you use Oracle Services Procurement, the Assignment Rates window displays information from the purchase order line for this assignment. You cannot update this information in the Assignment Rates window.

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

Use the Assignment Rates window.

To enter a rate for a contingent worker assignment:

1. Set your effective date to a date early enough for any historical information you want to enter.

2. Select the name that identifies the required combination of rate type and basis.

   See: Defining a Combination of Assignment Rate Type and Basis, page 2-88

   The Rate Type and Rate Basis fields are completed automatically.

3. Select a currency for the assignment rate.

4. Enter a monetary value for the assignment rate. For example, if the rate type is Weekend Rate and the basis is Hourly Rate, enter the hourly rate for weekend assignments.

5. Repeat steps 2 through 4 for additional assignment rates.

6. Save your work.

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

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

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

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

- An ex-contingent worker can begin a new placement on the day following the end of their latest placement.

- An ex-employee can begin a placement on the day following the termination of their employment.

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

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

1. Set your effective date to the placement start date.

2. Query the ex-contingent worker or ex-employee in the People window.

3. In the Action field, select Create Placement.

4. In the Person Type for Action field, select a person type. If only one person type is valid for the action, it appears automatically.

5. Save your work.

Employee Transfers and Secondments

Employee Transfers and Secondments

Employees are often required to move to different business locations. When such moves occur internationally, they usually involve moving from a *source* HRMS business group to a *destination* HRMS business group. To support such a move, you must create or update the employee record in the destination business group. In the source business group, you must either terminate the employee record (if the move is permanent) or suspend active assignments.

By means of *deployment proposals*, the Oracle HRMS Global Deployments function automatically creates or updates records as required when you move an employee between business groups. This function supports both temporary deployments (known in HRMS as *secondments*) and permanent transfers. Some setup tasks are necessary before first use of the Global Deployments function.

See: Setting Up Employee Transfers and Secondments, page 2-109

Deployment Proposals

The deployment proposal controls the secondment or transfer of an employee to a different business group. The deployment proposal identifies the:

- Source and destination business groups
- Reason for the deployment
- Deployment dates
- Employee to be deployed
- Employee's new assignment
- Contacts accompanying the employee

To create a deployment proposal, the HR Professional in the destination business group uses the Global Deployments function.

> **Note:** To create a deployment proposal, the HR Professional must have access to the employee's record in the source business group. Depending on security settings, this access may not be available. In this case, either the employee or an HR Professional in the source business group can use the SSHR Release Information function to release the employee's record to the HR Professional in the destination business

group.

An employee can have multiple Draft deployment proposals but only one Active deployment proposal at a time.

The approval process determines the status of the proposal and further actions that you can perform:

- If your enterprise does not use the approval process for deployment proposals, then the status of the deployment proposal can be:
  - Draft
  - Active
  - Complete

    The deployment proposal is in Draft status until the deployment begins. Its status is Active if the deployment is temporary and has started. Its status is Complete if:
    - The deployment is temporary and has finished.
    - The deployment is permanent and has started.

      See: Proposal Status and Actions, page 2-107

- If your enterprise uses the approval process for employee transfers and secondments, then you can view default approvers. In addition to the default approvers, you can add other people as approvers and recipients of the notification. You can add comments, if required. For information on the approval process for deployment proposals and the status of the proposals during the approval process, see: Overview of the Approval Process for Employee Transfers and Secondments, page 2-103

  See: Proposal Status and Actions, page 2-107

Initiating a Deployment

To initiate a deployment, the HR Professional selects Initiate Deployment for the relevant deployment proposal on the Global Deployments page.

Initiating a Permanent Transfer

When the HR Professional initiates a permanent transfer, the status of the deployment proposal changes from Draft to Complete.

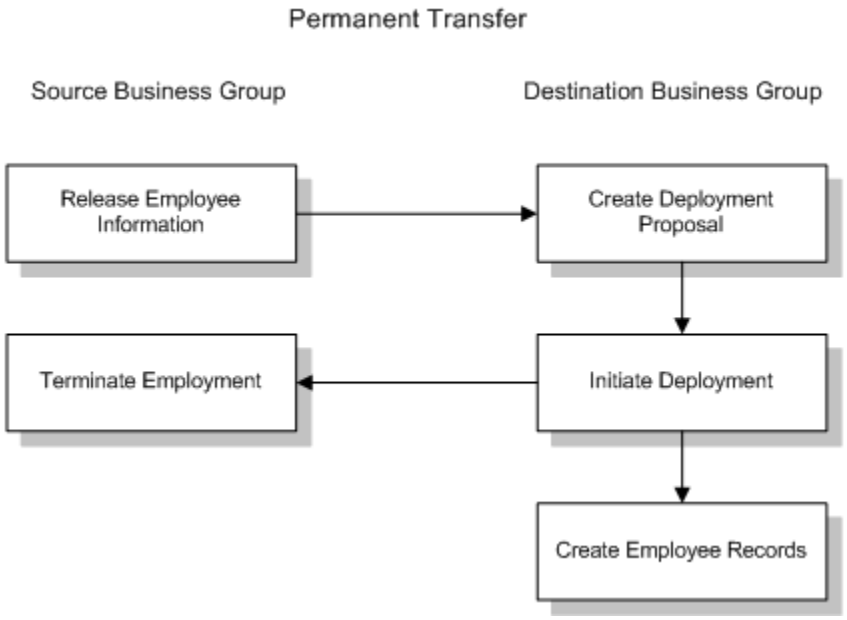
In the *source* business group, HRMS terminates the employee record on the day before

the deployment start date and sets the status of all assignments to the default terminate-assignment status. The person type is Ex-Employee from the deployment start date.

> **Note:** HRMS does not automatically set the Final Process Date (FPD) in the source business group. Setting FPD remains a manual task.

In the *destination* business group, HRMS creates or updates employee, assignment, and contact records using information from the deployment proposal. The person type and assignment status are those entered in the deployment proposal for the new assignment.

The following figure summarizes the stages of a permanent transfer:



Initiating a Temporary Secondment

When the HR Professional initiates a temporary secondment, the status of the deployment proposal changes from Draft to Active.

In the *source* business group, HRMS:

- Changes the current assignment status to the default suspended-assignment status. The effective date of the change is the start date of the deployment.

  If the default suspended-assignment status is not included in a payroll, but you want to continue paying the employee in the source business group, you can change the assignment status manually.

- Leaves the person type unaltered. However, you can update the person type

manually to indicate that the employee is on secondment, for example.

In the *destination* business group, HRMS creates or updates employee, assignment, and contact records using information from the deployment proposal. The person type and assignment status are those entered in the deployment proposal for the new assignment.

For information about maintaining the records of employees on secondment, see Employee Records During Secondment, page 2-101

Dates in the Destination Business Group

For both permanent transfers and temporary secondments, HRMS sets key dates in the destination business group as follows:

Date Field	Contains	Comments
Effective Date (Hire Date)	Deployment Start Date	
Latest Start Date	Deployment Start Date	
Date First Hired	Date First Hired from Source Business Group	
Period of Service Start Date	Deployment Start Date	
Adjusted Service Date	Hire Date from Source Business Group	
Projected Termination Date	Deployment End Date	For temporary secondments only
Projected Assignment End Date	Deployment End Date	For temporary secondments only

Initiating a Return from Secondment

To terminate a secondment, the HR Professional selects Initiate Return for the relevant deployment proposal on the Global Deployments page and enters the end date, which is the final day of the deployment. This date can differ from the deployment end date recorded in the deployment proposal. (Note that the application takes no action by default on the end date recorded in the deployment proposal.)

The approval process determines the status of the proposal and further actions that you can perform:

- If the initiate return proposal does not require approval, then the status of the deployment proposal changes from Active to Complete when you initiate the return, regardless of how far in the future the end date occurs.

  See: Proposal Status and Actions, page 2-107

  > **Note:** As you cannot update a complete proposal, do not initiate the return until the end date is certain.

- If the initiate return proposal requires approval, then you can view default approvers. In addition to the default approvers, you can add other people as approvers and recipients of the initiate return notification. When you click Submit, Oracle HRMS routes the transaction for approval. After the final approval, Oracle HRMS sets the status of the proposal to Return Initiated Complete and updates the relevant records. For more information, see: Overview of the Approval Process for Employee Transfers and Secondments, page 2-103

  See: Proposal Status and Actions, page 2-107

When the proposal status is set to Complete or Return Initiated Complete, in the *destination* business group, HRMS:

- Terminates the employee record and sets assignments to the default terminate-assignment status on the deployment end date
- Sets the termination reason and person type to values specified on the Initiate Return page

HRMS sets the following dates in the destination business group to the deployment end date:

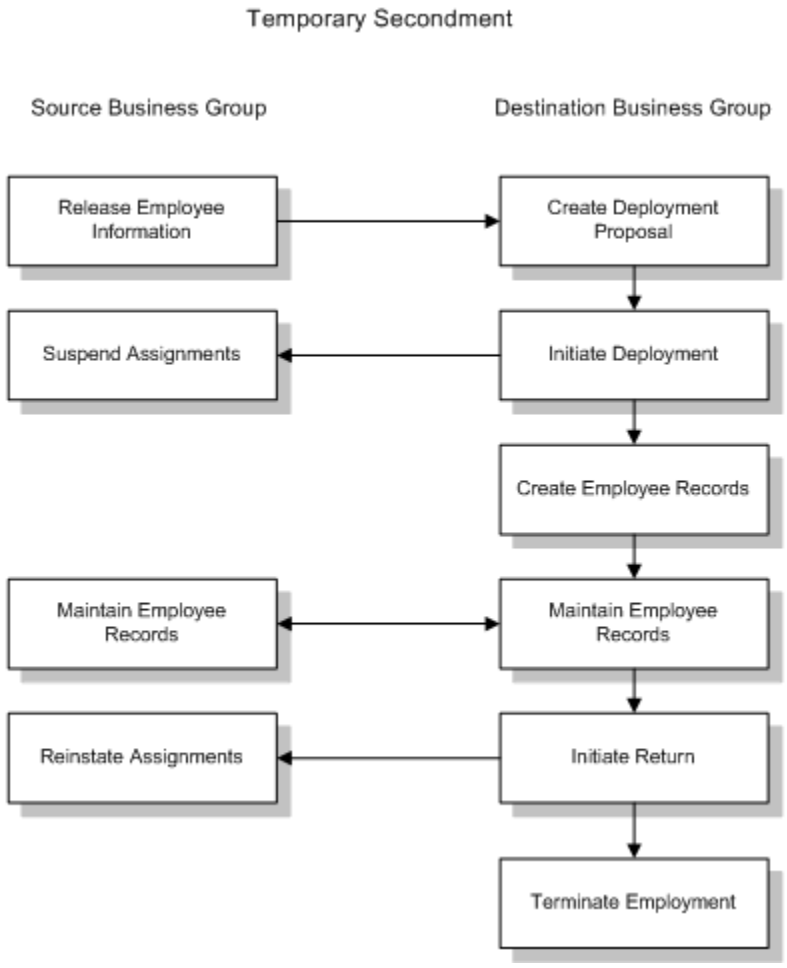
- Projected Termination Date
- Actual Termination Date
- Projected Assignment End Date
- Assignment Status Change Date

The employee's person type is Ex-Employee from the day following the deployment end date.

> **Note:** HRMS does not automatically set the FPD in the destination business group. Setting FPD remains a manual task.

In the *source* business group, HRMS changes the status of assignments suspended at the start of the secondment to Active Assignment. The effective date of these changes is the day following the deployment end date.

The following figure summarizes the stages in a temporary secondment:



Back-to-Back Deployments

An employee returning from a secondment must have at least one day's employment in the source business group before beginning any subsequent secondment or transfer. You cannot use the Global Deployments function to move an employee directly from one destination business group to a second destination business group.

Updating Deployment Proposals

For information about updating deployment proposals, see Updating Deployment Proposals, page 2-98

Employee Numbering

When you transfer an employee permanently or temporarily to a different business

group using the Global Deployments function:

- The employee keeps the employee number from the source business group if your enterprise uses global employee numbering.

- You can enter an employee number in the deployment proposal if your enterprise uses manual employee numbering in the destination business group.

In all other cases, HRMS allocates a new number to the employee using the numbering scheme in effect in the destination business group when you initiate the deployment.

Completing Initial Setup of Employee Records

The deployment proposal contains sufficient information for HRMS to create employee records in the destination business group and supply key data. However, you may need to enter additional information manually. For example:

- The application creates basic assignment information. You are recommended to review the assignment record and complete it as required.

- Other than assigning the employee to any payroll that you identify in the deployment proposal, the Global Deployments function has no effect on payroll and benefits setup. You may need to supply additional pay and benefits information for the employee.

- The application does not create optional records, such as the competency profile and qualifications records. If you intend to maintain these records in the destination business group, you must create them manually.

- In the U.S., you cannot assign an employee to a payroll unless you also enter the employee's primary address. As the deployment proposal does not contain address data, you must leave the Payroll field blank if the destination business group is in the U.S. and you use Oracle Payroll. After you initiate the deployment, you can log on to the destination business group to complete payroll setup and enter the employee's primary address.

  See: Entering People's Addresses at Sites with Oracle Payroll, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (US)*

For information about maintaining the records of employees transferred temporarily, see Employee Records During Secondment, page 2-101

Viewing Employee Records After Deployment

If the HR Professional or manager in the source business group needs access to the employee's records in the destination business group, the employee can release that information using the SSHR Release Personal Information function.

HR Professionals and managers in the destination business group can access the

deployed employee's records in the source business group using the SSHR My Employee Information function. After a permanent transfer, employee information in the source business group remains available only while the deployment proposal exists. If you delete the deployment proposal, the employee record in the source business group is no longer accessible from the destination business group.

Updating Deployment Proposals

The changes that you can make to a deployment proposal depend on the proposal status.

Updating Proposals that do not Require Approval

The following sections describe when you can update proposals if your enterprise does not use the approval process for employee transfers and secondments.

When you initiate a deployment proposal, its status changes from Draft to:

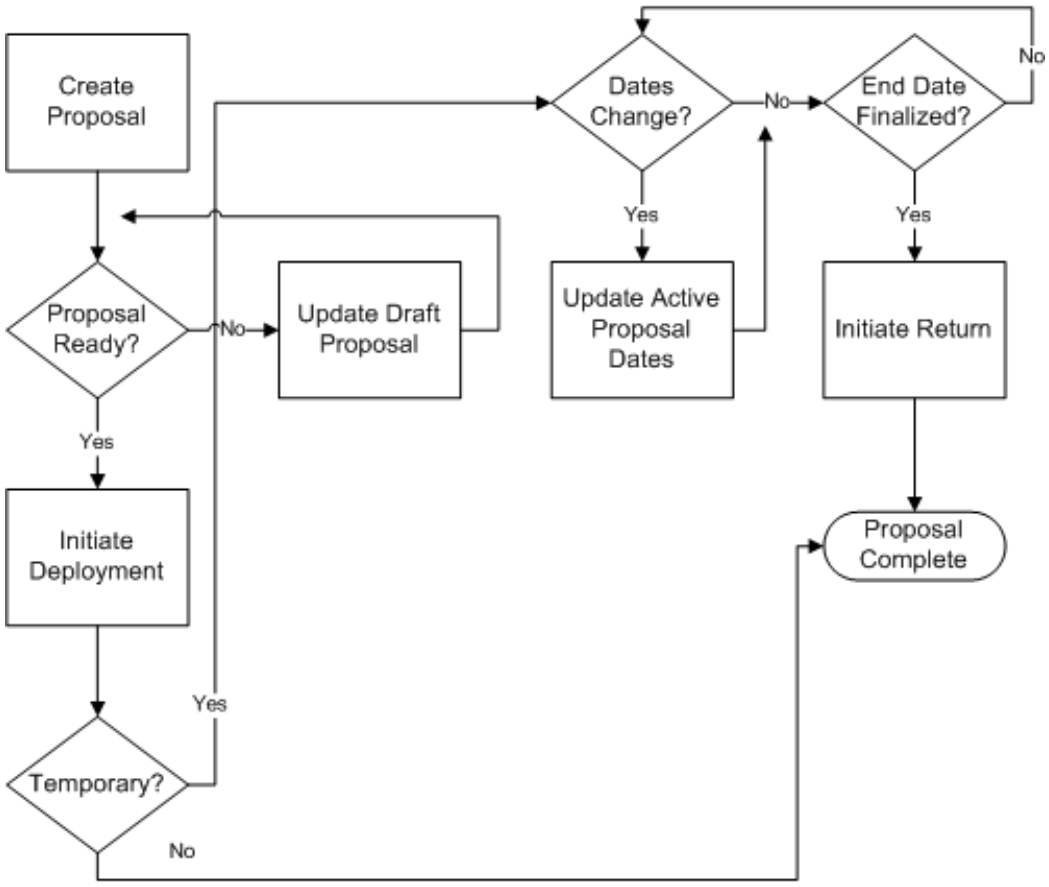
- Active, if the deployment is temporary
- Complete, if the deployment is permanent

When you initiate a return from secondment, the proposal status changes from Active to Complete.

The following figure shows the stages of a deployment proposal and indicates where updates are possible. The remainder of this topic discusses the changes that you can make at each stage.

> **Note:** The following figure shows the stages of a proposal that does not require approval.

Stages of a Deployment Proposal



Updating Draft Deployment Proposals

While the deployment proposal is in Draft status, you can update it as often as necessary. You can update any part of the proposal except:

- The name of the employee to be deployed
- The deployment type
- The name of the destination business group, which sets the context for all other information in the proposal

Updating Active Deployment Proposals

Once a deployment proposal for a secondment is Active, you can change its start and end dates. If you change the start date of a secondment, HRMS updates:

- All date fields containing the deployment start date in the destination business group

- The date of the assignment-status change in the source business group

  Note: If the new start date is in the past, and you have made other changes to the employee records since then, DateTrack rules may prevent HRMS from updating these dates.

If you change the end date of a secondment, HRMS updates:

- The Projected Assignment End Date in the destination business group

  This change is effective on the date that you make the change.

- The Projected Termination Date of the period of service in the destination business group

The employee record in the source business group is unaffected by a change to the deployment end date.

Updating Complete Deployment Proposals

You cannot update a deployment proposal that has a status of Complete. To change the dates of a permanent transfer, you must:

- In the source business group, manually reverse the employment termination and terminate the employment again on the revised date.

  See: Canceling a Termination, page 2-181

- In the destination business group, change the employee's start date.

Updating Proposals that are Routed Through the Approval Process

If your enterprise uses the approval process for proposals that you update, then you cannot initiate deployment until the proposal is approved. For more information, see: The Approval Process for Updated Temporary or Permanent Transfer Proposals, page 2-105

Similarly, if you update an employee return proposal, then the proposal must be approved for changes to take place.

See: Proposal Status and Actions, page 2-107

Deleting Deployment Proposals

You can delete Draft and Complete deployment proposals, but you cannot delete an Active deployment proposal.

Note: When you initiate a permanent transfer, HRMS terminates the employee's record in the source business group. The employee's manager in the destination business group can view this terminated record using the SSHR My Employee Information function only if the deployment proposal is available. Therefore, although you can delete proposals for completed deployments, Oracle recommends that you do not delete those for permanent transfers.

For information on proposals that you can delete, see: Proposal Status and Actions, page 2-107

Employee Records During Secondment

When you use the Global Deployments function to transfer an employee temporarily to another business group, HRMS automatically:

- Creates or updates employee records in the destination business group
- Suspends the employee's current assignments in the source business group

During the secondment, the employee has records to maintain in both business groups.

Maintaining Employee Records in Multiple Business Groups

HRMS provides standard mechanisms for maintaining employee data in multiple business groups:

- Employees have both local records (at the business-group level) and a corporate record (which links records for the same employee in multiple business groups). Some employee data is held in the corporate record, and the application automatically applies changes made to that data in one local record to all local records for the employee.

  See: People in a Global Enterprise, page 2-7

- HRMS can automatically synchronize person data that is considered to be global and that is held in multiple business groups for the same employee, such as e-mail address and correspondence language.

  See: Person Record Synchronization, page 2-21

Creating and Maintaining Optional Records

When the HR Professional initiates a deployment, HRMS does not create most optional components of the employee record, such as the competency profile and the qualifications record. However, the following records are visible by default from other business groups:

- Qualifications
- Establishments Attended
- Competency Profile (global competencies only)

> **Note:** You can use and view global competencies throughout the enterprise. Local competencies are accessible in a single business group only.

You may need to create and maintain such records manually in the destination business group if, for example, you want to perform an appraisal or record additional competencies achieved during a secondment.

Returning from Secondment

When a secondment ends, HRMS automatically:

- Terminates the employee record in the destination business group
- Reinstates suspended assignments in the source business group

During a secondment, HRMS can maintain most employee data automatically. However, you are recommended to review employee records in the source business group when a secondment ends and make any additions or corrections. For example, you may want to update the employee's competency profile or qualifications record.

If person record synchronization has not been enabled during the secondment, run the Person Synchronization report to identify differences and make any changes manually.

See: Person Record Synchronization, page 2-21

Data Items Transferred During the Predefined Global Deployment Process

Following is a list of data items transferred during a deployment in the predefined Global Deployment process:

- Person Type
- Department
- Position
- Job
- Grade

- Location
- New Manager (Name, Assignment Number and Department. Oracle HRMS retains direct reports in case of permanent deployment)
- Dependents (if any)
- Employee Number (will be transferred to the destination business group if there is no such employee number in the destination business group, otherwise the application prompts to enter the valid employee number for the destination business group)
- Segments mentioned in the Person developer descriptive flexfield
- Payroll Name
- People Group Name
- Assignment Status
- Assignment Status Change Reason
- Assignment Category
- Adjusted Service Date (if any)
- Work Schedule
- Person Extra Information Type (EIT) (Displays the list of EITs available while creating deployment proposal. User can select the ones that need to be transferred to the destination business group).

Overview of the Approval Process for Employee Transfers and Secondments

Enterprises can use the approval process to route deployment proposals for approval.

Using the approval process, HR Professionals can:

- Route the deployment proposals created for temporary and permanent transfers.
- Update deployment proposals and route them through the approval process.
- Initiate the return of employees to the source business group and route these transactions through the approval process.
- Track the approval status of deployment proposals.

- Initiate the deployment after the deployment proposal is approved.

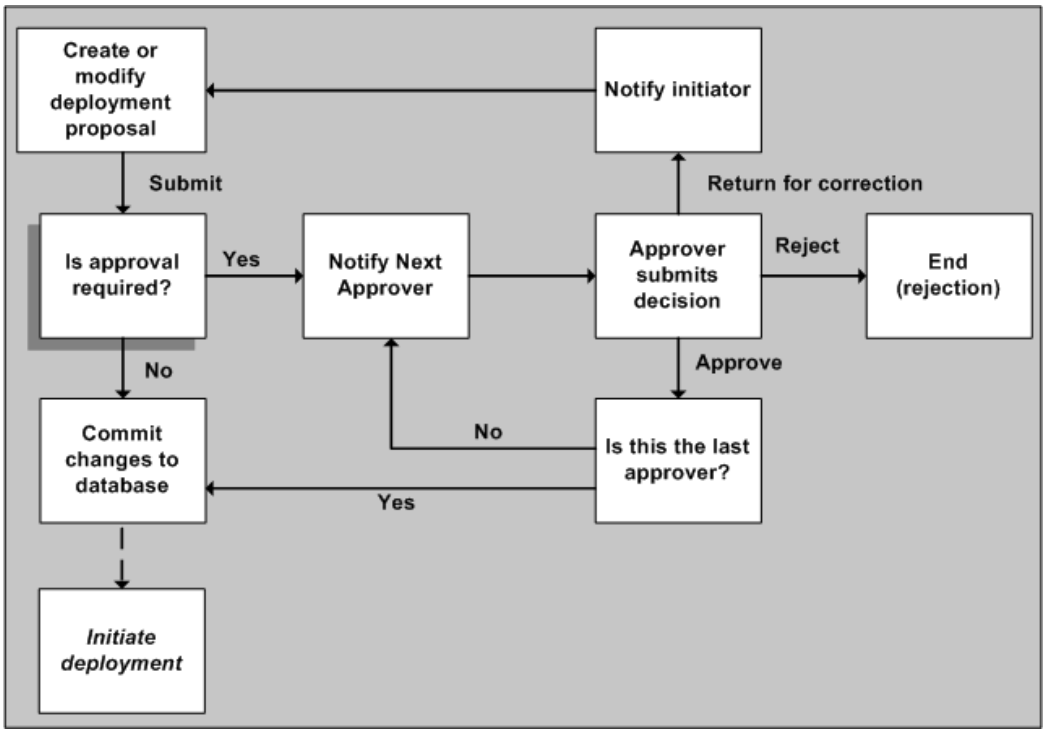
The following sections explain how the approval process works for employee transfers and secondments, if enterprises use the approval process.

The Approval Process for Temporary or Permanent Transfer Proposals

As an HR Professional, when you create a deployment proposal for a temporary or permanent transfer, the Add Approvers region appears on the Create Proposal: Review page. By default, Oracle HRMS routes all deployment proposals through two levels of approvers in the supervisory hierarchy. Your enterprise can configure the number of approvers based on business requirements. In the Approvers region, you can search and add adhoc approvers. You can also select FYI recipients and add comments about the proposal.

The status of the deployment proposal is set to Pending for Approval during the approval stage. Approvers can approve, reject, or return for correction the deployment proposals. The proposal initiator receives FYI notification at every step of the approval process. You can initiate the deployment only if the status is set to Approved.

The following diagram shows the approval cycle starting with creating or modifying a deployment proposal:



For permanent transfers, when the deployment is initiated, Oracle HRMS sets the proposal status to Complete. For temporary transfers, when the deployment is initiated, the proposal status is set to the Active status. The Projected Assignment End Date and Assignment Status fields display the values if information is available. For example, the assignment status in the destination business group displays the Active Assignment value.

The Approval Process for Updated Temporary or Permanent Transfer Proposals

The ability to update temporary or permanent transfer proposals depends on the status of the proposals. See: Proposal Status and Actions, page 2-107

When you update a proposal, the Approvers region appears in the Review page. You can view the approvers who will receive the proposal for review. You can also select FYI recipients and add comments about the proposal.

The status of the deployment proposal is set as Pending for Approval when the updated proposal is in the approval stage. Approvers can approve, reject, or return for correction the updated deployment proposals. The proposal initiator receives FYI notification at every step of the approval process. You can initiate the deployment only if the status is set to Approved.

For permanent transfers, when the updated deployment is initiated, Oracle HRMS sets the proposal status to Complete. For temporary transfers, when the updated deployment is initiated, the proposal status is set to the Active status. The Projected Assignment End Date and Assignment Status fields display the values if information is

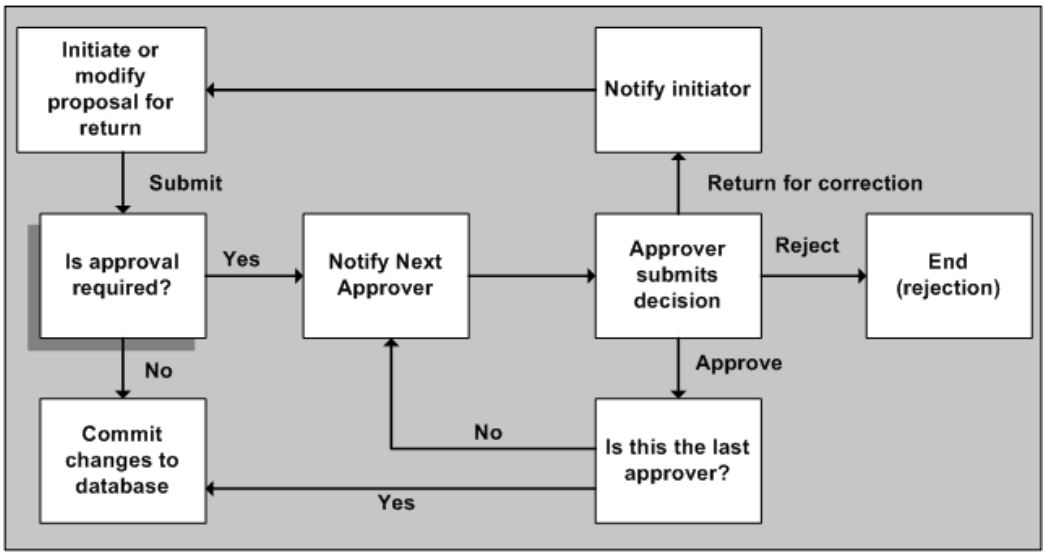
available. For example, the assignment status in the destination business group displays the Active Assignment value.

The Approval Process for Return Proposals

As an HR Professional, when you initiate the return of an employee to the source business group, you can view the Add Approvers region in the Review page. This region lists the approvers of the proposal. By default, all deployments initiated for return are routed through two levels of approvers in the supervisory hierarchy. Your enterprise can configure the number of approvers based on business requirements. You can search and add adhoc approvers in the Add Adhoc Approver region. You can also select FYI recipients and add comments about the proposal.

When you submit the initiate return transaction for approval, the proposal is set at the Return Initiated - Pending for Approval status. Approvers can approve, reject, or return for correction the proposal. The proposal initiator receives FYI notification at every step of the approval process.

The following diagram shows the approval cycle starting with initiating or modifying a proposal for return of an employee:



Based on the approval received, the application sets the status of the deployment either to Return Initiated - Approved, Return Initiated - Rejected, or Return Initiated - Returned for Correction. After the final approval, the application sets the status to Return Initiated - Complete and updates the relevant records.

The Approval Process for Updated Return Proposals

You can update return proposals that are at one of the following statuses:

- Return Initiated Complete
- Return Initiated Returned for Correction
- Return Initiated Rejected

If you update a proposal, then Oracle HRMS routes the proposal for further approval based on the approval setup. If the proposal is approved, then the status is set to Return Initiated Complete.

Proposal Status and Actions

The proposal status determines the actions that you can perform for a deployment proposal. The actions that you can perform also depend on whether the deployment proposal is routed through the approval process.

Deployment Proposals that do not Require Approval

The following table describes the actions that you can perform for proposals that are at a specific status, if your enterprise does not use the approval process for employee transfers and amendments.

Deployment Proposal is	Status	Update	Initiate Deployment	Initiate Return	Delete
At the draft stage	Draft	Yes	Yes	No	Yes
Temporary and has started	Active	Yes. Remains at the Active status after update	Not Applicable	Yes	No
Temporary and has finished	Complete	No	Not Applicable	Yes	Yes
Permanent and has started	Complete	No	Not Applicable	Not Applicable	Yes

Deployment Proposals Require Approval

The following table describes the actions that you can perform for proposals that are at a specific status, if your enterprise uses the approval process for employee transfers and amendments.

Deployment Proposal is	Status	Update	Initiate Deployment	Initiate Return	Delete
Temporary or permanent and is submitted for approval	Pending for Approval	No	No	No	No
Temporary or permanent, which is updated and is in the approval process	Pending for Approval	No	No	No	No
Temporary or permanent, which is updated and returned for correction	Returned for Correction	Yes	No	No	Yes
Temporary or permanent, which is updated and is rejected	Rejected	Yes	No	No	Yes
Temporary or permanent and is returned for correction	Returned for Correction	Yes	No	No	Yes
Temporary or permanent and is rejected	Rejected	Yes	No	Not Applicable	Yes
Temporary and approved	Approved	Yes	Yes	Not Applicable	Yes
Permanent and has started	Complete	No	Not Applicable	Not Applicable	Yes

Deployment Proposal is	Status	Update	Initiate Deployment	Initiate Return	Delete
Temporary and has started	Active	Yes. Status can change to Pending for Approval, Rejected, or Approved depending on the update approval	Not Applicable	Yes	No
Initiate return and is submitted for approval	Return Initiated Pending for Approval	No	Not Applicable	Not Applicable	No
Initiate return and is returned for correction	Return Initiated Returned for Correction	Yes	Not Applicable	Not Applicable	Yes
Initiate return and is approved	Return Initiated Complete	Yes	Not Applicable	Not Applicable	Yes
Initiate return and rejected	Rejected	Yes	Not Applicable	Not Applicable	Yes

Setting Up Employee Transfers and Secondments

Perform the following setup tasks before first use of the Global Deployments function.

To set up employee transfers and secondments:

In destination business groups:

1. Add reasons for employee transfers and secondments (for example, Career Development, Business Need, and Skills Transfer) to the Deployment Reasons (HR_DEPLOYMENT_REASONS) lookup.

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

2. For employees on secondment to this business group, define additional user person types for the Employee and Ex-Employee system person types. For example, define the user person types:

   - Employee on Secondment (for the Employee system person type)
   - Ex-Seconded Employee (for the Ex-Employee system person type)

   See: Defining Person Types, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. To identify the assignments of employees on secondment, define user assignment statuses (for example, Active Secondment) for the system assignment status Active Assignment.

   See: Defining Assignment Statuses (Assignment Window), page 2-120

4. Add assignment-status-change reasons applicable to employees on secondment (for example, Employee on Secondment) to the Employee Assignment Change Reason (EMP_ASSIGN_REASON) lookup.

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

5. For employees completing secondments, add termination reasons (for example, Completed Secondment) to the Leaving Reason (LEAV_REAS) lookup.

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

6. In deployment proposals, HR Professionals can elect to exclude transferred or seconded employees from U.S. New Hire reports and specify a reason. To extend the list of reasons for exclusion, update the US New Hire Exceptions (US_NEW_HIRE_EXCEPTIONS) lookup.

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

7. By default, the Global Deployments function appears on the global People menu. Add the function to relevant HR Professional menus.

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

In source business groups:

1. Add the SSHR Release Information function for HR Professionals, which appears by default on the global People menu, to relevant HR Professional menus.

In both source and destination business groups:

1. Review the setting of the HR: Propagate Data Changes profile option at the site level. If you do not set this profile option to Yes, the application cannot automatically propagate changes made to the records of employees on secondment.

   See: Person Record Synchronization, page 2-21

2. Consider using the Checklists function to assign and track standard, repeatable tasks associated with employee transfer and secondment.

   See: Checklists Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

Approval process for employee transfers and secondments:

Enterprises can use the approval process to route deployment proposals through approvals. The Add Approvers region automatically appears on the following pages during transactions:

- Create Proposal: Review (DeplPropReviewCreatePG)
- Update Proposal: Review (DeplPropReviewUpdatePG)
- Review (DeplReturnReviewPG)
- Update Active Transfer (DeplActiveUpdatePG)

The following table provides a list of functions that support approvals in employee transfers and secondments.

Function Name	User Function Name	Web HTML Call	Parameters
HR_GOLD_RETURN_INIT_SS	Global Deployment Initiate Return Page	OA.jsp?page=/oracle/apps/per/deployment/webui/DeplReturnPG	pApprovalReqd=YD&pAMETranType=SSHRMS&pAMEAppId=800&pItemType=HRSSA&pProcessName=HR_GENERIC_APPROVAL_PRC&pApprovalMode=YD&pNtfFyiDetails=Y&pCalledFrom=HR_GOLD_RETURN_INIT_SS&OAFunc=HR_GOLD_RETURN_INIT_SS&addBreadCrumb=Y&pNtfSubMsg=HR_GOLD_RTN_NTF_SUB_MSG

Function Name	User Function Name	Web HTML Call	Parameters
HR_GOLD_NTF_SS	Global Deployment Notification Container	OA.jsp?page=/oracle/apps/per/deployment/webui/DeplPropReviewNtfRN&akRegionApplicationId=800	N
HR_GOLD_RETURN_NTF_SS	Global Deployment Return Initiation Notification Container	OA.jsp?page=/oracle/apps/per/deployment/webui/DeplReturnReviewNtfRN&akRegionApplicationId=800	N
HR_GOLD_CREATE_SS	Global Deployments Create Page	OA.jsp?page=/oracle/apps/per/deployment/webui/DeplPropTferDtlsCreatePG	pApprovalReqd=YD&pAMETranType=SSHRMS&pAMEAppId=800&pItemType=HRSSA&pProcessName=HR_GENERIC_APPROVAL_PRC&pApprovalMode=YD&pNtfFyiDetails=Y&pCalledFrom=HR_GOLD_CREATE_SS&OAFunc=HR_GOLD_CREATE_SS&addBreadCrumb=Y&pNtfSubMsg=HR_GOLD_NTF_SUB_MSG

Function Name	User Function Name	Web HTML Call	Parameters
HR_GOLD_UPDATE_SS	Global Deployments Update Page	OA.jsp?page=/oracle/apps/per/deployment/webui/DeplPropTferDtlsUpdatePG	pApprovalReqd=YD&pAMETranType=SSHRMS&pAMEAppId=800&pItemType=HRSSA&pProcessName=HR_GENERIC_APPROVAL_PRC&pApprovalMode=YD&pNtfFyiDetails=Y&pCalledFrom=HR_GOLD_UPDATE_SS&OAFunc=HR_GOLD_UPDATE_SS&addBreadCrumb=Y&pNtfSubMsg=HR_GOLD_NTF_SUB_MSG
HR_GOLD_ACT_UPDATE_SS	Global Deployments Active Transfer Update page	OA.jsp?page=/oracle/apps/per/deployment/webui/DeplActiveUpdatePG	pApprovalReqd=YD&pAMETranType=SSHRMS&pAMEAppId=800&pItemType=HRSSA&pProcessName=HR_GENERIC_APPROVAL_PRC&pApprovalMode=YD&pNtfFyiDetails=Y&pCalledFrom=HR_GOLD_ACT_UPDATE_SS&OAFunc=HR_GOLD_ACT_UPDATE_SS&addBreadCrumb=Y&pNtfSubMsg=HR_GOLD_NTF_SUB_MSG

By default, these functions are configured to enable the approval process for employee transfers and secondments. The function parameter values are set to the predefined workflow item type, workflow processes, and the AME transaction type.

> **Note:** The pApprovalReqd parameter determines the approvals usage. By default, the pApprovalReqd parameter is set to YD (Yes with Dynamic approval region enabled on the page). If you do not want to use the approval process for employee transfers and secondments, then you must set the pApprovalReqd parameter value to N, for example, pApprovalReqd=N, for the appropriate functions.

Oracle HRMS uses the following predefined components for the delivered approval process:

- HR workflow item type (internal name: HRSSA), which contains delivered workflow processes.

  See: Workflow Objects and Item Types, *Oracle SSHR Deploy Self-Service Capability Guide*

- SSHRMS AME transaction type, which contains predefined attributes, conditions, and rules.

  See: Oracle Approvals Management (AME) Configuration, *Orcle SSHR Deploy Self-Service Capability Guide*

Depending on their business requirements, enterprises can configure the workflow item type, related workflow, and the Oracle Approvals Management (AME) transaction type. For example, the default approval rule requires two levels of approval for deployment proposals for employee transfers or secondments. You can create a new rule that requires three levels of approvals for transfers or secondments of senior manager positions and add the rule to the predefined transaction type. For information on the components used in AME and how to configure the components, see: *Oracle HRMS Approvals Management Implementation Guide*.

Workforce Information Management

Assignment Statuses

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

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

Primary Statuses

There are four system statuses for assignments:

- **Active Assignment**: For employees and contingent workers you use this status to show that the person is working in accordance with his or her usual conditions of working.

- **Suspend Assignment**: For employees you use this status to show that an employee is on leave of absence, but remains an employee with your enterprise. Similarly for contingent workers the suspend assignment indicates that a contingent worker is not currently working in the assignment they are allocated to. For example, the contingent worker may have taken an unauthorized absence or the assignment may have been suspended due to an internal review.

- **Terminate Assignment**: Use this to show that your enterprise no longer employs the person in that assignment. It can still be possible to make payments through Oracle Payroll for assignments at this status. This status is not available for use with contingent workers.

- **End**:Use this to end any assignment except the primary assignment for an employee or contingent worker with multiple assignments. This status is not recorded on the assignment; it causes the assignment to end. For employees all payroll processing for the assignment is complete and the assignment becomes an historical record.

For information about system statuses for applicants see: Applicant Assignment Statuses, page 1-12.

User Statuses

On your system, you can give these statuses different *user statuses* appropriate to your enterprise. Each system status can have several user statuses related to it. For example, for the system status Suspend Assignment, you could define the user statuses Paternity

Leave, Disability Leave, or Education Leave. When you use Oracle HRMS, you only see the user statuses.

> **Note:** Each system status has a predefined user status of the same name.

Primary user statuses help you track the current working circumstances of your employees and contingent workers. You can also define secondary user statuses having no associated system statuses. You can use these for reporting purposes.

> **Note:** The User Statuses you define provide the list of values for Status in the Assignment window. If you want to change any of the predefined default values you must overwrite the User Name.

Using Assignment Statuses to Control Compensation

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

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

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

Secondary Assignment Statuses

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

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

You enter secondary statuses in the Secondary Statuses window.

To enter reasons for giving secondary statuses to assignments, define valid reasons as values for the Lookup Type EMP_SEC_ASSIGN_REASON (for employee assignments), CWK_SEC_ASSIGN_REASON (for contingent workers), and APL_SEC_ASSIGN_REASON (for applicant assignments).

Setup To Allow Processing After Termination

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

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

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

- Use the Assignment Statuses window to make sure your system has a user status that corresponds to:

  - the HR system status of *Terminate Assignment*

  - the Payroll system status of *Process*

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

Assignment Extra Information Types (EITs)

You can define as many Extra Information Types (EITs) as you require to hold information about assignments. This topic also lists predefined EITs that you can use.

> **Note:** To be able to access the predefined EITs, you must link the EIT to your responsibility. See: Setting Up Extra Information Types Against a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

- RTI Information

  Use this EIT to capture the following RTI related data required for the Employer Alignment Submission and Full Payment Submission:

  1. Number of Periods Covered – Enter the number of periods for which the employee has been paid being reported in the FPS. It will automatically get set to '1' as a default after you have submitted the FPS to HMRC.

  2. Normal Hours Band – Specify the normal hours band to which an assignment belongs, if normal assignment hours or configuration values module mapping the user placement of hours mapping is not used. If, however, the hours are mapped or normal assignment hours are in use, then the FPS process derives

the normal hours band and reports this accordingly for the employee.

> **Note:** The FPS for 2013/14 picks the band from this EIT, where as the FPS for 2014/15 picks the normal hours band from the RTI information element.

3. Irregular Payment - Indicate if the assignment has a payment that is considered as irregular payments being reported on the FPS according to the specification from HMRC.

4. One-Off Payment – Indicate if the assignment has a payment that is considered as a 'one-off' payment being reported on the FPS according to the specification from HMRC.

5. ExPat - Set to Yes if assignment is for an ex-pat as this needs to be reported on the EAS.

6. Payment to a Non Individual – Set to Yes if assignment is a payment to a non-individual as this needs to be reported on the EAS and FPS. For example, payments to a contractor's limited company or a self employed person who gets paid an invoice amount and not classified as a salary.

7. On Strike – Set to Yes if assignment being reported is considered to be on strike therefore needs to be reported on the FPS.

8. Unpaid Absence – Set to Yes if assignment is on unpaid absence and therefore needs to be reported on the FPS.

> **Note:** If you have your own attributes or functions for these items, then you must map the configuration types relating to these to your own data. This mapping ensures that RTI reporting uses your fields/functions instead of the assignment and person EITs related to RTI. See: Mapping Existing Data for RTI

9. EYU NI Refunded: If a submitted amendment results in a NI contribution being refunded to the employee, then select Yes. The default value is Yes if the value during the NI contribution period is negative.

> **Note:** A negative value can have different meanings: for example, it may represent an actual refund or a manual adjustment for the employee's record.

If you change the default value, ensure that a true statement is sent to HMRC.

10. Date of Leaving Reported to HMRC: The employee's leaving date as reported to HMRC.

11. Late PAYE Reporting Reason – Select one of the following as the reason:
    - A - Notional payment: Payment to Expat by third party or overseas employer
    - B - Notional payment: Employment related security
    - C - Notional payment: Other
    - D - Payment subject to Class 1 NICs but P11D/P9D for tax
    - E - Micro employer using temporary "on or before" relaxation
    - F - No working sheet required; impractical to report
    - G - Reasonable excuse
    - H - Correction to earlier submission

12. Late PAYE Reporting Reason to be Retained: Specify whether you want the late PAYE reporting reason to be retained or not.

13. Flexibly Accessing Pension Rights: The default value is No. Select Yes if part of the payment enables employees to flexibly access their pension or in the following situations:
    - Payment of a flexi-access drawdown pension or an uncrystallised funds pension lump sum.
    - Optional inclusion in appropriate submissions until April 2016.

    This record would be provided if the Recently Bereaved Spouse/Civil Partner (Occupational Pension) indicator is present.

    Note: If you have your own attributes or functions for any of the preceding items, then complete the mapping of the configuration types relating to your own data/FF (formula functions) result. When configured, the application uses these user-defined fields/functions when reporting for RTI instead of the seeded EIT attributes as listed on the EIT. Additionally, note that the EITs are not date tracked and care should be taken

in deciding to use Oracle seeded attributes which are not date-tracked and you should use your own placeholders or formula functions to derive these items on a period by period basis for reporting.

Defining Assignment Statuses (Assignment Window)

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

Defining Primary User Statuses

To rename a user status:

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

To supply additional user statuses for a system status:

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

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

6. Save the new status.

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

When you update the assignment statuses, the application saves the changes in the PER_ASS_STATUS_TYPE_AMENDS table instead of the PER_ASSIGNMENT_STATUS_TYPES table.

You cannot delete a user status, but you can prevent its use by deactivating it. To deactivate a user status, uncheck the Active check box.

Defining Secondary Statuses

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

To create a secondary status:

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

   The Type field displays *Secondary*.

Entering an Assignment (Assignment Window)

When you enter an employee or contingent worker, or hire an applicant, Oracle HRMS automatically creates a default assignment. You can view and update the default assignment in the Assignment window.

You can then enter additional assignments, if required, using the Assignment window.

To enter an assignment:

1. Set your effective date to the start date of the new assignment.

   Germany only: If you want to link a contract to this assignment, you should do so before completing any further fields, as some fields in the Assignment window default to values defined on the contract and cannot be overridden here. Add contract details using the Contract field on the Employment Terms tabbed region. If you are assigning a contingent worker, the Employment Terms tabbed region does not display, preventing you from adding a contract.

2. Select the organization to which you want to assign the employee or contingent worker. By default, the employee has an assignment either to the business group, or to the organization to which he or she applied. Contingent workers have a default assignment connected to the business group.

   If you overwrite these defaults, a window appears asking if the change is an update or a correction. Select Correction.

   If you are creating an additional assignment, no default business group or organization is displayed.

3. Select the job or position for which this person has been assigned.

   France only: For a public sector type organization, the Position field is read only. Oracle HRMS displays the position details you recorded using the HR Administrator Actions pages.

   Russia only: Click the Attachments Menu icon on the tool bar to enter the contingent worker's job description.

   India only: The position selected is displayed on the employee's Form 16.

4. For employee assignments, select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.

5. If you defined a location for the business group or other organization, it appears as a default. Change this, if required.

   Mexico only: The assignment's location determines its GRE.

   - If you have assigned multiple GREs to a location (through the generic hierarchy), you must choose which one applies to this assignment. Navigate to the Statutory Information tabbed region and make a selection in the Government Reporting Entity field.

   - If you change your assignment's GRE, you must specify a Social Security Leaving Reason (under the Social Security Affiliation tabbed region).

     See: Transferring Employees, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Mexico)*

6. **France only**: Select the establishment as it serves as the legal point of contact for settling any disputes and manages the personal details of the workforce.

   > **Note:** For a public sector type organization, the Establishment field is read only. Oracle HRMS displays the establishment details you recorded using the HR Administrator Actions pages.

7. **Netherlands only**: Select the reporting employer. The assignment is reported under

this employer in the wage report. If you change the employer establishment after running the payroll and before running the Wage Report, the collective report section on the Wage report will not match the sum of nominative reports.

> **Note:** By default, the assignment is reported under the employer linked to the assignment's payroll. Changing the employer does not change the Payroll Object Group. To change the Payroll Object Group, terminate the existing assignment and create a new assignment with a new payroll. You can change the employer linked to the payroll using the Payroll window.

8. Select the people group and enter information defined in your people group flexfield. This is optional.

9. Select a payroll if you are paying an employee using Oracle Payroll, or if you intend to record for the employee certain types of compensation and benefits (represented on the system by *nonrecurring elements*).

   > **Note:** If Oracle Payroll is installed and you are an HR User, you cannot assign employees to payrolls. Ask your system administrator to change your HR:User Type profile option if you need to assign employees to payrolls.

   > **Note: Denmark Users:** Select Salaried or Hourly. There is no relation to the Payroll frequency.

10. Select a status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).

    See: Assignment Statuses, page 2-115

    Australia Only: Select if the employee works overseas or as part of Joint Petroleum Development Area (JPDA). The status you specify determines which earnings appear on which Payment Summary.

11. **Korea Only**: Select the business place to which you assign your employee.

12. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee or contingent worker number, for the first assignment.

13. For employee assignments, select a collective agreement if the employee is covered by one.

    You can calculate values based on a collective agreement only for an employee's

primary assignment.

14. Select an assignment category, for example part-time or full-time.

    Hungary only: Select an employment category, for example part-time or full-time.

    Ireland only: Select an employment category, for example part-time or full-time. Select Apprentice/Trainee if the assignment is an apprentice or a trainee.

    Mexico only: Select the employee's Social Security employment type.

    See: Define the Social Security Employment Types, *Oracle HRMS Implementation Guide (Mexico)*

    Netherlands only: If the Assignment Category is set to Dismissal Pay , then nothing will be sent in the Employment field of the CBS File. Ensure any assignments to be retrieved for the CBS file do not have this value selected in the Assignment Category.

    Change any assignments with the category Trainee to Fulltime-Trainee, to return a value of 1 in the Employment field of the CBS File.

    Russia only: This field is mandatory to enable you to use them for reporting purposes. Use only the four values available for this field. For these values, the suffix Regular refers to an assignment with an indefinite period (permanent). The suffix Temporary refers to an assignment having a limited term.

15. For employee assignments, select the employee category, for example blue collar or white collar.

    Ireland only: Select a valid employment category from the list. The list displays all the occupation categories for reporting in the EHECS report.

    Mexico only: Select the employee's Social Security employment category.

    Spain only: Select the professional category, for example administration clerk or civil servant.

16. Enter the information you want to hold in the tabbed regions, for example, supervisor details, special ceiling progression points, or salary information.

    See: Entering Additional Assignment Details, page 2-125

    You can use the Oracle HRMS and Common application Components (CAC) integrated schedule features to assign a schedule to the worker's assignment. If you want the application to only display schedules the worker is eligible for, then run the Eligibility Engine process for the worker.

    See: Setting Up Availability, page 2-171

Entering Additional Assignment Details (Assignment Window)

Once you have set up basic assignment details, you can enter additional information, such as supervisor details, special ceiling progression points, and salary information, in the tabbed regions of the Assignment window. The tabbed regions that appear in the Assignment window vary according to person type and localization.

> **Note:** For countries other than the US or UK, your Oracle localization team may have created additional fields in a tabbed region to hold legislatively required additional information.

To enter salary information for an employee:

Use the Salary page to enter a proposed salary change for an employee, associate this change with a performance review, and accept or revise the change later. To administer an employee's salary in this way, you first assign the employee to a salary basis in the Salary Information region.

1. Choose the Salary Information tabbed region.
2. Select a salary basis for the employee.
3. You can also enter the frequency of salary and performance reviews.

> **Note:** When you change salary basis for an assignment, the application end dates the existing proposal and creates a new salary proposal. The new proposal updates the salary element entry automatically. When you remove a salary basis from an assignment, the application end dates the existing salary element entry, enabling you to manually create a new salary element entry effective from the date of the salary basis change.

For more information about salary administration, see: Salary Administration, *Oracle HRMS Compensation and Benefits Management Guide*

To enter supplier information for a contingent worker:

You use the Supplier tabbed region to record information about the supplier providing the contingent worker to your enterprise. The procedure depends on whether you are using Oracle Services Procurement to provide purchase order information for contingent worker assignments.

If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

2. Select the names of the supplier and the supplier site for the contingent worker.

3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

If you are using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

2. Select a purchase order number for this assignment.

3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.

4. Information from the purchase order appears automatically in the Supplier Name and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.

5. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.

2. Select the name and number of the worker's personal supervisor. If you use assignment-based supervisor hierarchies, select the supervisor's assignment number.

   You can select a contingent worker as a supervisor only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.

   You can select a supervisor from another Business Group if the HR:Cross Business Group user profile option is set to Yes at your site.

   > **Note:** The application does not update this information. Use organization and position hierarchies to show management reporting lines.

To enter probation period and notice information for an employee:

The probation period defaults from the employee's position.

1. Choose the Probation and Notice Period tabbed region.

2. Amend the default probation period for your employee's assignment, if required.

3. Enter the notice period for the assignment, if required.

To enter standard conditions information for an employee or contingent worker:

To enter schedule information for a person, you can:

- Set up extensive availability information such as, shifts, schedules, and calendar events using integrated features from HRMS and Common Application Components (CAC).

  See: Setting Up Availability, page 2-171

- Set up holiday calendars, shifts, and work plans in OTL.

  See: Time Management Structures, *Oracle Time and Labor Implementation and User Guide*

Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the Assignment window.

> **Important:** The application does not use the schedule information that you can enter here to determine a worker's availability. This is for information purposes only.

The decision for which method to set up is based on knowledge of which applications use which information.

The standard work day information (apart from the Hourly/Salaried field) defaults from the position. If standard conditions are not defined for the position, they default from the organization or Business Group.

1. Choose the Standard Conditions tabbed region.

2. Amend the standard work day information for your employee or contingent worker assignment, if required.

3. This step is for employees only. For benefit administration, enter whether the assignment is hourly or salaried. If you are in the US, benefits are often based on whether a person is paid hourly or receives a salary.

   > **Note:** If you are setting up benefits based on salaried or hourly pay you must set up the Hourly/Salaried field in addition to the Pay Basis. The Pay Basis identifies how pay is quoted within Salary Administration and enables an employee to have their pay quoted as hourly, but be paid a salary. Therefore, for benefits, you need to set up whether your employee is paid hourly or receives a salary.

To enter primary or secondary assignment and miscellaneous information for an employee or contingent worker:

1. Choose the Miscellaneous tabbed region.

2. Enter the internal address details (such as the floor or office number), if required. The system adds the details to the location address.

3. Select a reason for adding or changing the assignment. For example, you can use the Reason field to record promotions for your employees. You define valid reasons as values for the lookup types Reason for Change to Employee Assignment (EMP_ASSIGN_REASON) for employees and Contingent Worker Assignment Reasons (CWK_ASSIGN_REASON) for contingent workers.

4. Select the Manager box if the assignment is at manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.)

5. By default, the first assignment entered is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, you must ensure that the Primary box is unchecked.

   Check the Primary check box to update a secondary assignment to Primary.

   See: Changing Primary Assignments, page 2-132

6. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the date appears in the Projected Assignment End field. Otherwise, enter the projected end date of the assignment.

To enter special ceiling information for an employee:

A special ceiling progression point is the highest point to which the Increment Progression Points process can automatically progress the employee.

1. Choose the Special Ceiling tabbed region.

2. Enter a special ceiling only if the employee is assigned to a grade, and if a grade scale is defined for this grade. This special ceiling overrides the ceiling defined for the grade scale.

To enter a billing title for an employee or contingent worker (Oracle Projects only):

1. Choose the Project Information tabbed region.

Note: The Project Information tabbed region displays only if you have installed Oracle Projects.

2. Enter a billing title. The information you enter in the Billing Title field serves as the default title on project customer invoices. You can override this information using Project Accounting.

3. Enter a project title.

To enter grade ladder information for an employee:

You must enter grade ladder information to use the Grade/Step Progression process.

1. Choose the Grade Ladder tabbed region.

2. Select the grade ladder for this assignment. If you selected a grade for this assignment previously, all the grade ladders that use that grade are available. If you have not selected a grade, all the active grade ladders in your enterprise are available.

To enter bargaining unit and union membership information for an employee:

1. Choose the Bargaining Unit tabbed region.

2. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized collective negotiating organization.

   Note: You set up your different bargaining units as values for the Lookup type BARGAINING_UNIT_CODE

3. Select whether the employee associated with the assignment is a member of a union.

To enter employment terms for an employee:

1. Choose the Employment Terms tabbed region.

2. Select the contract to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment start date.

   Note: If you are a German public sector user, selecting a contract defaults some values, for example pay grade, from the contract into

the assignment. If you want to amend these values you must change them on the contract as you cannot update them in this window.

3. Select the agreement grade structure for the collective agreement. A window shows the grade factors for that grade structure.

4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet those criteria.

   If you enter values directly into the grade factor fields, they must correspond to an existing reference grade unless the Override Allowed check box in the Agreement Grades window is checked.

   Note: Any new combinations of values that you enter are unavailable for reuse with other assignments. To reuse a combination, you must define it as a reference grade in the Agreement Grades window.

Entering Employment Information for Employees and Applicants

To enter employment information for employees and applicants:

1. Choose the Employment Information tabbed region.

2. Select the person's ethnic origin.

3. Enter the work permit number for a non-EEA person.

4. Check the boxes to indicate that the person is a director, a pensioner, or has multiple assignments that you want to aggregate for processing.

5. For reporting purposes, enter any period of service that is not recorded on the system but that should count for pension calculations.

What Next?

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

Entering Additional Employment Information (Multiple windows)

Just as you can record additional information about people, such as their addresses,

contacts, and skills, you can also record additional information associated with each employee assignment. The main items of information are as follows:

1. You can propose or approve a salary change in the Salary Administration window.

   See: Entering Salary for a New Employee (or One Assigned to a New Salary Basis), *Oracle HRMS Compensation and Benefits Management Guide*

2. You can make entries to the earnings, deductions, benefits and other elements the employee is eligible for, using the Element Entries window.

   Mexico only: You must standard link the following elements for all Mexican employees:

   - Employer State Tax
   - Integrated Daily Wage
   - Mexico Tax
   - Social Security Quota

   See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

   To confirm they are attached to the assignments, or to add them manually, see: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

3. If you use a pay scale and progression point system, you can place the assignment on a pay scale using the Grade Step Placement window.

   See: Placing an Employee on a Grade Step, *Oracle HRMS Enterprise and Workforce Management Guide*

4. You can select the cost centers or accounts to which the costs of the assignment should be allocated, using the Costing window.

   See: Data Costed at the Organization and Assignment Levels, *Oracle HRMS Enterprise and Workforce Management Guide*

5. You can use the Assignment Budget Values window to specify the value of the assignment in terms of headcount, full time equivalent (FTE), or any other budgets you have defined.

   See: Budgeting Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

6. For employees who have assignments to payrolls, you can select the methods by which the employee wants to receive pay for this assignment in the Personal Payment Method window.

   See: Entering Payment Methods for an Employee Assignment, *Oracle HRMS*

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7. You can enter secondary assignment statuses for analysis and reporting, if these have been defined on your system.

   See: Entering Secondary Assignment Statuses, page 2-134

8. You can enter extra information about your employee's assignment using the Extra Assignment Information window.

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

9. You can enter previous employment information for your employee's using the Previous Employment window.

   See: Entering Previous Employment Details, page 2-72

Changing Primary Assignments

Over time, a secondary assignment may need to be elevated to a primary assignment. Most enterprises have requirements to show this history of changes in an employee record. You can change assignments from secondary to primary in the Hiring Applicants window or the Managing Employees window.

This process creates two historical records: one showing a secondary assignment that ended, say, on 20 October, and the other showing that the primary assignment started as one set of components and then changed to another set (those of the secondary assignment) on 21 October.

To change a primary assignment:

1. Set an effective date for the change of primary assignment.
2. Find the person using the Data Organizer or the Find window.
3. Select the person in the Data Organizer and select one of their assignments.
4. Choose the Actions button.
5. Select Make Primary Assignment and choose Next.

   The system automatically changes the previous primary assignment from primary to secondary. Query the assignment details to see the changes, or use the Assignment History window to view the employee's assignments. DateTrack History also shows the changes made to assignments.

   For more information about DateTrack see: Viewing the History of Datetracked Information, *Oracle HRMS Enterprise and Workforce Management Guide* and

Managing Change Over Time, *Oracle HRMS Enterprise and Workforce Management Guide*

6. **Mexico only:** If the change in assignments involves a change of GREs, you must specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region.

Ending an Assignment (Assignment Window)

An employee must always have one active assignment. If an employee has multiple assignments you can end any of their individual assignments by selecting an assignment status of End or Terminate in the Assignment window as long as at least one assignment remains active. If you want to end all employee assignments at the same time you use the Termination window. An employee does not become an ex-employee until you have terminated their last assignment.

The following information explains how to use the Assignment window to end multiple assignments.

To end one of several assignments:

1. Query the assignment you want to end.

2. Set your effective date to the actual termination date for the assignment.

3. Update the assignment status to End or Terminate Process Assignment (or the equivalent user status on your system) in the Status field:

   - Use *TerminateProcess Assignment* (with a Payroll system status of *Process*) if further pay processing of the assignment is required after the date the assignment ends. This leaves the assignment's final processing date open so that further processing can occur.

     It is often best to use this status, so that you can process any necessary adjustments to the final pay for the assignment.

   - Use *End* (with a Payroll system status of *Do Not Process*) if all pay processing for the assignment is finished. This makes your effective date the assignment's *final processing date,* after which no further processing for the assignment can occur.

   The End status is not recorded on the assignment. It causes the assignment to end as of the effective date of entry of this status.

   > **Note:** To temporarily prevent pay processing for this assignment, use the status *Terminate Assignment* (with a Payroll system status of *Do Not Process*). When no further processing is required and you are ready to set a final processing date, update the status to *End*.

4. **Mexico only**: Specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region. The Social Security Affiliation reports require this information.

Entering Secondary Assignment Statuses

Your implementation team may have created secondary assignment statuses for analysis and reporting of employee or applicant assignments.

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

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

To give a secondary status to an assignment:

1. Select the status and enter a start date.
2. You can also select a reason for giving the new status.

   When a status no longer applies, simply enter an end date.

Removing Title from Person Search Lists

To remove the title from existing records without updating them you should run the Remove Title from Person's Full Name concurrent process. This concurrent process enables you to remove the title so that it does not appear in Person Search lists, such as the Find window on the Person window.

You run the Remove Title from Person's Full Name concurrent process from the Submit Requests window.

To remove title from person's full name:

1. Select Remove Title from Person's Full Name in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select a legislation.
4. Choose the OK button.
5. Choose the Submit button.

Using Mass Assignment Update

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

Process Overview

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.

Status	Description
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.
Validated New Record(s)	Target validated successfully.

Performing a Mass Assignment Update

To make mass assignment updates for employees, contingent workers, or both, you are recommended to use the Mass Assignment Update window. If the Mass Assignment Update window is not available, use the Mass Employee Assignment Update window to make mass assignment updates for employees.

If you make mass assignment updates to working hours, frequency, or other data that affects derived Assignment Budget Values (such as FTE or Percent Full Time), recalculate and update the values using the concurrent process Calculate Assignment Budget Values.

See: Running the Calculate Assignment Budget Values Process, *Oracle HRMS Enterprise and Workforce Management Guide*

Korean users only: To make mass assignment updates for employees and contingent workers, use the KR Mass Assignment Update window.

To identify the records you need to update:

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply).
3. Select Contingent Worker or Employee. Select both values to retrieve records for both contingent workers and employees.
4. If you select Employee *only* and GRE (Government Reporting Entity) information applies in your legislation, go to Step 5. Otherwise, go to Step 9.
5. Click in the GRE field.

   The GREs and other data window appears.
6. Specify any GRE search criteria.
7. To exclude records from the result set defined by the GRE search criteria, choose

Combinations.

The Enter Reduction Criteria for Long-List window appears.

For example, if you select Yes in the Seasonal Worker field in the GREs and other data window, and select Day Shift in the Shift field in the Enter Reduction Criteria for Long-List window, the result set comprises all seasonal employees, minus those who work the day shift.

8. Choose OK.

9. If the Criteria window is not already open, click in the Other Criteria field.

10. Enter or select work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all workers whose jobs begin with "MGR".

11. Choose OK.

    The People Group Flexfield window appears.

12. Specify any people group search criteria.

13. To exclude records from the result set defined by the people group search criteria, choose Combinations.

    The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify workers to be removed from the group of workers identified by the people group search criteria. For example, if you select a particular benefit program in the People Group Flexfield window, and a pension plan in the Enter Reduction Criteria for Long-List window, the result set comprises all members of the selected benefit program, minus those belonging to the selected pension plan.

14. Choose OK.

To retrieve the identified records

15. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.

    The application displays assignment records that meet the selection criteria.

16. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

To specify the changes you want to make

17. Choose the New tab.

    Note: Some values you can update on this tab apply to either contingent workers or employees, but not both. Although you can specify inappropriate values (for example, you can select a payroll for a contingent worker), Oracle HRMS writes a warning message to the log and does not update the worker record with invalid information.

18. Click in the Change List field.

    The Change List window appears.

19. Select or enter values in fields you want to update. Choose OK.

    If you are updating employee records *only* and GRE information applies in your legislation, go to Step 20. Otherwise, go to Step 21.

20. In the GREs and other data window, select or enter values in fields you want to update. Choose OK.

21. In the People Group Flexfield window, select or enter values in fields you want to update. Choose OK.

22. Select a DateTrack mode.

To apply your changes and submit them to the database

23. Choose Create New.

    The updated assignment records appear.

24. To make further general changes to these records before you submit them to the database, repeat from Step 18.

25. To update information for an individual worker, update the relevant record on the New tab.

    Note: Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

26. To commit the updated records to the Oracle HRMS database, choose Submit.

    The application creates a concurrent request and displays its identifier. View the

results in the View Requests window.

Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See Reviewing and Correcting Mass Assignment Update Errors, page 2-142

Using Mass Employee Assignment Update

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

Process Overview

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.

Status	Description
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.
Validated New Record(s)	Target validated successfully.

Performing a Mass Assignment Update

To make mass assignment updates for employees, contingent workers, or both, you are recommended to use the Mass Assignment Update window. If the Mass Assignment Update window is not available, use the Mass Employee Assignment Update window to make mass assignment updates for employees.

Korean users only: To make mass assignment updates for employees, use the KR Mass Employee Assignment Update window.

To identify the records you need to update:

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply).
3. Click in the People Group field. The People Group Flexfield window appears.
4. Specify any people group search criteria.
5. To exclude records from the result set defined by the people group search criteria, choose Combinations.

   The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify employees to be removed from the group of employees identified by the people group search criteria. For example, if you select a particular benefit program in the People Group Flexfield window, and a pension plan in the Enter Reduction Criteria for Long-List window, the result set comprises

all members of the selected benefit program, minus those belonging to the selected pension plan.

6. Choose OK.

7. If the Criteria window is not already open, click in the Other Criteria field.

8. Enter or select work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all employees whose jobs begin with "MGR".

9. Choose OK.

10. If GRE information does not apply in your legislation, go to Step 14. Otherwise, if the GREs and other data window is not already open, click in the GRE field.

11. Specify any GRE search criteria.

12. To exclude records from the result set defined by the GRE search criteria, choose Combinations.

    The Enter Reduction Criteria for Long-List window appears.

    For example, if you select Yes in the Seasonal Worker field in the GREs and other data window, and select Day Shift in the Shift field in the Enter Reduction Criteria for Long-List window, the result set comprises all seasonal employees, minus those who work the day shift.

13. Choose OK.

To retrieve the identified records

14. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.

    The application displays assignment records that meet the selection criteria.

15. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

To specify the changes you want to make

16. Choose the New tab.

17. Click in the Change List field.

The Change List window appears.

18. Select or enter values in fields you want to update. Choose OK.

19. If GRE information applies in your legislation, in the GREs and other data window select or enter values in fields you want to update. Choose OK.

20. In the People Group Flexfield window, select or enter values in fields you want to update. Choose OK.

21. Select a DateTrack mode.

To apply your changes and submit them to the database

22. Choose Create New.

    The updated assignment records appear.

23. To make further general changes to these records before you submit them to the database, repeat from Step 17.

24. To update information for an individual employee, update the relevant record on the New tab.

    Note: Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

25. To commit the updated records to the Oracle HRMS database, choose Submit.

    The application creates a concurrent request and displays its identifier. View the results in the View Requests window.

    Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See Reviewing and Correcting Mass Assignment Update Errors, page 2-142

Reviewing and Correcting Mass Assignment Update Errors

When you submit a mass assignment update to the Oracle HRMS database, the application creates a concurrent request and displays its identifier. For each concurrent request, the application creates an error log file containing details of any errors. Note that Oracle HRMS does not apply invalid changes to records.

To view the results of a mass assignment update, use the Requests window.

To review the error log:

1. In the Find Requests window, enter the concurrent request ID of the mass assignment update.

2. In the Requests window, select the request and choose View Log.

   The error log appears, showing mass assignment update errors grouped by assignment number. For each error, the log includes a description of the cause and a suggested action.

To correct the error:

Use the Mass Assignment Update window (for employees and contingent workers) or the Mass Applicant Assignment Update window.

1. Retrieve the relevant mass assignment update. Records in error have the status Error New Record(s).

2. Select the records you are correcting and deselect all other records.

3. Correct the requested changes or the DateTrack mode (as suggested in the error log) for relevant records.

   Note: You cannot update records whose status is Completed.

4. Choose Submit.

   Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

   If an attempted update fails repeatedly, edit the assignment record directly.

Purging Transaction Data

Transactions such as mass updates, position transactions, and budget worksheets all store temporary data in transactions tables in your database. Once the transaction has been completed, the data in these tables is applied to permanent tables. However, a duplicate version of this data also remains in the temporary tables, taking up unnecessary space.

To clear this data once a transaction is completed, you can use one of the purge processes, depending on the type of transaction you have completed.

Note: These processes do not affect any applied data. All applied

information is still available to edit in the normal windows.

Use the Submit Request window.

To run the Purge Budget Worksheets, Purge Position Transaction, or the Purge Mass Processes process:

1. Select either Purge Budget Worksheets, Purge Position Transaction, or Purge Mass Processes in the Name field.
2. Click in the Parameters field to display the Parameters window, if it does not open automatically.
3. If you are running the Purge Mass Processes process, select the type of transaction you want to purge, for example, Mass Applicant Assignment Update, or Position Copy.
4. Select the status of the transactions you want to purge. This limits the transactions purged to only those with the selected status.
5. Enter the dates between which you want transactions cleared.
6. Click OK. You can view a log file containing details of the purge from the Requests window.

Using Mass Applicant Assignment Update

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

Process Overview

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.
Validated New Record(s)	Target validated successfully.

Performing a Mass Applicant Assignment Update

To make mass assignment updates for applicants, use the Mass Applicant Assignment Update window.

To identify the records you need to update:

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply)..
3. If the People Group Flexfield window is not already open, click in the People Group

field.

4. Specify any people group search criteria.

5. To exclude records from the result set defined by the people group search criteria, choose Combinations.

   The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify applicants to be removed from the group of applicants identified by the people group search criteria. For example, if you select a particular professional organization in the People Group Flexfield window, and a geographical region in the Enter Reduction Criteria for Long-List window, the result set comprises all members of the selected professional organization, minus those in the selected geographical region.

6. If the Criteria window is not already open, click in the Other Criteria field.

7. Enter or select recruitment and work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all applicants for jobs that begin "MGR".

8. Choose OK.

To retrieve the identified records

9. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.

   The application displays assignment records that meet the selection criteria.

10. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

To specify the changes you want to make

11. Choose the New tab.

12. Click in the Change List field.

    The Change List window appears.

13. Select or enter values in fields you want to update. Choose OK.

14. In the People Group Flexfield window, select or enter values in fields you want to

update. Choose OK.

15. Select a DateTrack mode.

To apply your changes and submit them to the database

16. Choose Create New.

    The updated assignment records appear.

17. To make further general changes to these records before you submit them to the database, repeat from Step 12.

18. To update information for an individual applicant, update the relevant record on the New tab.

    > **Note:** Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

19. To commit the updated records to the Oracle HRMS database, choose Submit.

    The application creates a concurrent request and displays its identifier. View the results in the View Requests window.

    Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See Reviewing and Correcting Mass Assignment Update Errors, page 2-142

Self-Service Actions

Overview of Self-Service Actions

Most enterprises adhere to rules, regulations, and reporting requirements when changing the terms of work. Oracle Self Service Human Resources (SSHR) provides a set of configuration tools and web flows for initiating, updating, and approving self-service actions according to prescribed rules.

Self-service actions represent the business processes, or *actions*, that change the conditions of employment in your enterprise. Public sector organizations typically refer to these processes as personnel actions, and they include business actions that manage hiring, training, promotion, transfer, compensation, and termination. Self-service actions are useful for any enterprise that wants to configure business processes using rules to determine eligibility and approval requirements, track action history as well as details, or generate standard documents for specific actions.

Self-service actions fall into three overall types, each with its own unique expectations, rules, and requirements:

- Hiring
- Deployment
- Termination

Oracle SSHR emphasizes business process over data maintenance. Though the interface provides an online form that you fill out in the course of navigating a series of web pages, your implementation team organizes the sequence and content of the data to reflect the standards and practices of your organization. With each self-service action, your implementation team defines a process consistent with the way your organization manages changes to personnel records. You design and implement your own version of each process, and specify the business rules that enable you to route each action for approval automatically.

SSHR provides a transition from technical orientation to functional. This approach enables you to initiate and manage self-service actions as business processes with which you are already familiar, rather than maintaining data in the abstract in application windows. Your focus is on the task you need to perform. Some examples of the predefined SSHR workflow modules supported by self-service actions include:

- Hiring or termination
    - Recruitment
    - New Hire

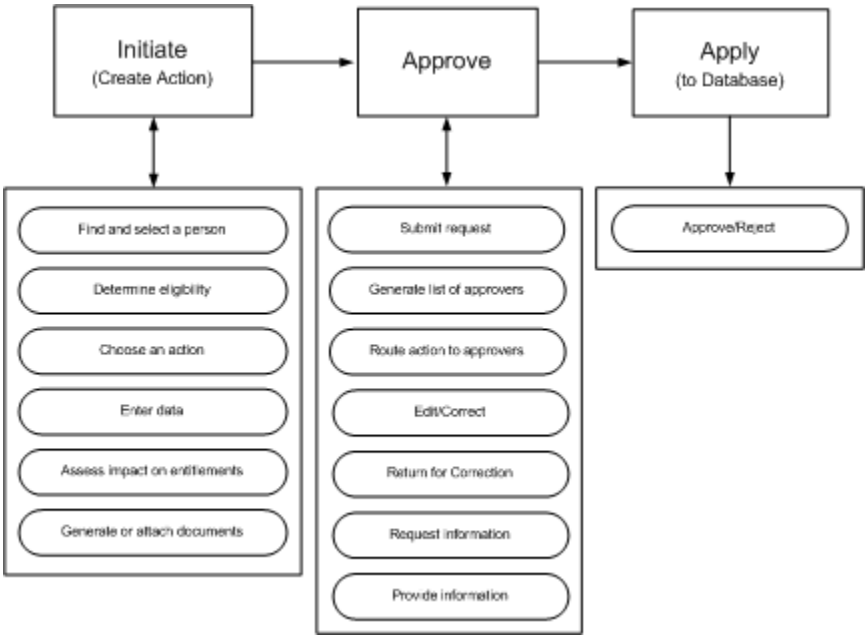
    - Applicant Hire
    - Termination
    - Termination with compensation
- Deployment or status changes
    - Employee Status Change (assignment, full/part time, grade, movement within pay scale)
    - Transfer
    - Leave of Absence (long term absence, sickness, sabbatical)
    - Special/Extra Information Types (ending training or apprenticeship periods, disciplinary actions)
    - Other Employment Information (ending training or apprenticeship periods, disciplinary actions)
    - Individual Compensation Distributions (awarding bonuses or other specific pay and allowance types)

You carry out a self-service action in three overall stages that reflect standard business procedures:

- Initiate
- Approve
- Apply

For each stage, your implementation team has a range of options and features to configure unique process flows you recognize as a reflection of the way you do business. The following process flow diagram displays all the features available. What you see may differ, depending on your organization's requirements.

Life Cycle of a Self - Service Action



Initiate

Advanced search capability helps you confirm that you have selected the correct person before initiating an action. The People List and Actions page tell you whether or not a person is eligible for an action on the specified effective date. The Actions page notifies you of your own pending actions on the selected person, actions you have saved for later, and actions on the selected person awaiting approval of others. If your organization's requirements permit, you can specify that your action take effect on a date you specify, or "on approval". You enter the data that your enterprise, rules, and regulations require. What-If analysis gives you a real-time view of the impact of your proposed action on the selected person's entitlements to compensation and benefits. You can generate formatted documents, such as a pre-approval Request for Action, or a standard letter, containing merged values from your action. In addition, you can attach supporting documents, such as a resume, certificate, or Web address. Before submitting your action for approval, you can add to the list of approvers, or add people to notify.

Approve

Self-service actions use Oracle's standard workflow and approvals management tools. Oracle AME generates a list of approvers and Oracle Workflow routes your action automatically. Approvers retrieve notifications from their Worklist. Approvers with appropriate update privileges can modify the action, including its effective date. Recipients can request additional information, or return the action for correction to previous approvers. If the database encounters intervening or future-dated actions on the same person, it refreshes your action with the appropriate values, or routes your action to a Human Resources representative after approval for manual entry of the

changes.

Apply

The application applies the action to the database after final approval.

SSHR workflow features enable you to engage in an online collaborative environment in which you can focus on the task of routing and approving actions based on their merits, with near transparency regarding selection and notification of approvers.

See: Configuring Self-Service Actions, page 2-151

See: Managing Conflicting Actions, page 2-154

See: Initiating a Self-Service Action, page 2-159

See: Approving a Self-Service Action, page 2-164

Configuring Self-Service Actions

The sections below describe the process of configuring Self - Service Actions in SSHR. Some procedures are optional, for example, setting up eligibility processing or document management. Implementing the workflow processes and functions your enterprise requires is prerequisite to configuring self - service actions. When you have completed the configuration of workflow processes and functions, you must implement the following procedures:

- Set system profile options
- Define access roles
- Personalize pages
- Add a sub menu to user menus
- Set up eligibility processing
- Set up document management

If previous implementations have not configured Oracle Approvals Management (AME) with the attributes, conditions, approval types, and rules your organization requires to manage routing and approving actions, you must configure these if you want to enhance the default behavior. The default is to route the action to the top of the supervisory hierarchy or 10 levels above the Initiator, whichever comes first.

> **Note:** In order to use the new workflow features associated with self-service actions, you must upgrade to the SSHR V5 approval process.

See: Implementation Steps for Self-Service HR (SSHR), *Oracle SSHR Deploy Self-Service*

Capability Guide

Set System Profile Options

Configure the system profiles at the Site level. The eight profiles directly relating to configuring self-service actions are as follows:

- HR:Allow Approver updates to Self Service actions
- HR:Allow concurrent Self Service actions
- HR:Manage Self Service actions when future-dated changes exist
- HR:Refresh Self Service actions with data from intervening actions
- HR:Display Position Hierarchy
- HR:Allow use of eligibility for Self Service actions
- HR:Allow processing of ineligible Self Service actions
- HR:Run BENMNGLE when processing a Self Service action

If you do not enable HR:Allow Approver updates to Self Service actions, only the Initiator is able to update or change the effective date of an action you return for correction. Approvers will be unable to use attachments.

Oracle recommends that you configure two related options in tandem:

- HR:Manage Self Service actions when future-dated changes exist
- HR:Refresh Self Service actions with data from intervening actions

Enable or disable these two options together. If you set the former to *Allow approval (Notify HR Rep)*, enable the latter as well.

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

Define Access Roles

Create and assign access roles, to grant update privileges to those who approve self-service actions, or deny them to those who do not. The Initiator of an action has privileges based on menu access, and does not need an access role.

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

Personalize Pages

Personalize self-service pages. Personalizations play a key role in configuring self-service actions, including the following:

- Personalizing workflow processes to display or hide pages or data fields (performed when you configure workflow processes)
- Personalizing the Review page to display or hide What If analysis or attachments
- Personalizing the Effective Date page to allow users to enter the effective date manually, specify that an action takes effect on approval, or both.

See: Configuring Web Pages, *Oracle SSHR Deploy Self-Service Capability Guide*

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

Add a Sub Menu to User Menus

Attach the sub menu *HR Self-Service Pages sub menu* to user menus so that users can see the following pages:

- Effective Date
- Sub Actions
- Return for Correction
- Refresh Attributes
- Document Manager pages

See: Defining Menus for SSHR, *Oracle SSHR Deploy Self-Service Capability Guide*

Set Up Eligibility Processing

Optionally, set up automatic determination of a person's eligibility for an action, using SSHR Compensation and Benefits functionality as a generic processing engine. You do this in four stages:

- Define Eligibility Profiles
- Define Plans (sub actions)
- Define Reporting Groups (actions)

See: Eligibility Processing Setup Example, *Oracle SSHR Deploy Self-Service Capability Guide*

Set Up Document Management

Optionally, configure documents and groups in Document Manager to provide formatted business documents in PDF format, containing merged data from workflow processes. Examples include Request for Change, Notification of Change, correspondence, or contracts.

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

Managing Conflicting Actions

A typical implementation for self-service actions allows you to process multiple changes to a person's record at the same time. Another common configuration allows any approver on the chain of recipients to change the effective date of an action. The ability to process concurrent actions and choose an effective date at any point in the approval process adds both flexibility and complexity. For example, what if another manager submits a status change that affects a person's grade at the same time you are processing a job change on the same person? What if you submit a change of working hours, and another manager approves a transfer while your action is in process? What if choosing a retroactive effective date for a bonus means that another bonus (already approved) becomes effective on a future effective date to your own?

The flexibility of processing multiple changes simultaneously requires the application to handle complex interactions among three dates associated with each action:

- **Initiation date**: the date you submit your action for approval (usually the system date)
- **Effective date**: the date your approved action takes effect (not necessarily the approval date)
- **Approval date**: the date you save your action to the database

The application helps you manage complex situations arising from interactions among multiple actions and dates in three ways. Consider three scenarios:

1. **Concurrent Actions:** The application processes multiple actions on a selected person at the same time. On final approval, each action takes effect on its own effective date, superseding any actions with a previous effective date.
2. **Intervening Actions:** After your action is in process, the application encounters an approved action on the same person with an effective date that falls between your initiation date and effective date. Your setup can help you manage which information prevails, and (as appropriate) replace values in your action.
3. **Future-Dated and Retroactive Actions:** After your action is in process, the application encounters an approved action on the same person with a later effective

date. Your setup can allow you to route your action to a Human Resources representative on final approval, for manual entry of all appropriate changes.

Concurrent Actions

When you begin an action, the application checks the person/assignment combination for other actions currently in process:

- Saved for Later
- Returned for Correction
- Awaiting Approval of Others

Most implementations allow concurrent actions. Otherwise, if you try to begin an action on a person with pending changes, you cannot proceed beyond the Actions page. But in a typical setup, existing actions on the selected person appear as actions Awaiting Your Attention or Awaiting the Approval of Others.

Intervening Actions

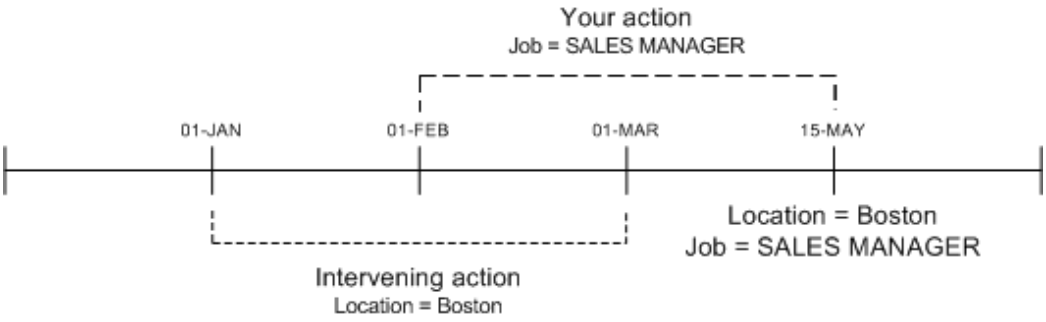
Intervening changes can occur for a variety of reasons, most often due to delays between request and approval. Another manager can approve a change to your selected person's record after your own action has entered the approval process. When the application encounters approved changes to your selected person's record, effective somewhere between your own action's initiation date and effective date, it manages them in one of two ways. Consider two scenarios:

1. After you submit your job change for approval, an HR manager approves a transfer on the same person while your action is still in process. In this case, the intervening change of location prevails, because your action does not specify a location. You may still need to know about the transfer, however, in order to decide whether to approve, update, send back for correction, or cancel your job change.

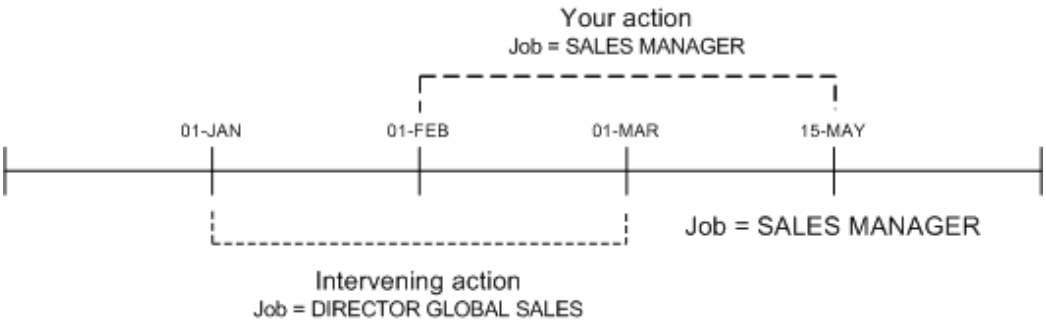
2. Your action's proposed job change conflicts with an intervening change from another manager that specifies a different job. Because both your action and the intervening action specify a job, your action's proposed job prevails, because your action has the later effective date. Nevertheless, you may need to know about the intervening job change in order to make a more informed decision about your own proposed job change.

In the following illustrations, broken lines connect the initiation date and effective date of each action. Another manager approves an intervening action while yours is still in the approval process.

Scenario 1: Intervening Action Specifying Different Attributes



Scenario 2: Intervening Action Specifying the Same Attributes



When intervening actions exist, and as an approver when you receive a transaction for approval, you must click Update Action for approval notifications to refresh with data from intervening actions.

Data refresh options enable you to manage potential conflicts by replacing your action's values with the changed information from the intervening action (scenario 1), or preserving the values from your action (scenario 2). The application displays a Refresh page with a table informing you of the original, intervening, and prevailing values.

> **Note:** The application may also display a Refresh page if you change the effective date of your action. A new effective date can create potential conflicts with values in effect at a different point in time.

Future-Dated and Retroactive Changes

When the application encounters an approved change to your selected person's record, effective subsequent to your action's effective date, configuration options can help you to manage potential conflicts by routing your action on approval to a person with an HR Representative role. On review, the HR representative applies all necessary changes to the database manually.

You can perform an action on a person retroactively by choosing a past effective date. The application treats changes to the person's record subsequent to your effective date as future-dated actions, and routes your action on final approval to an HR representative.

Process Flow

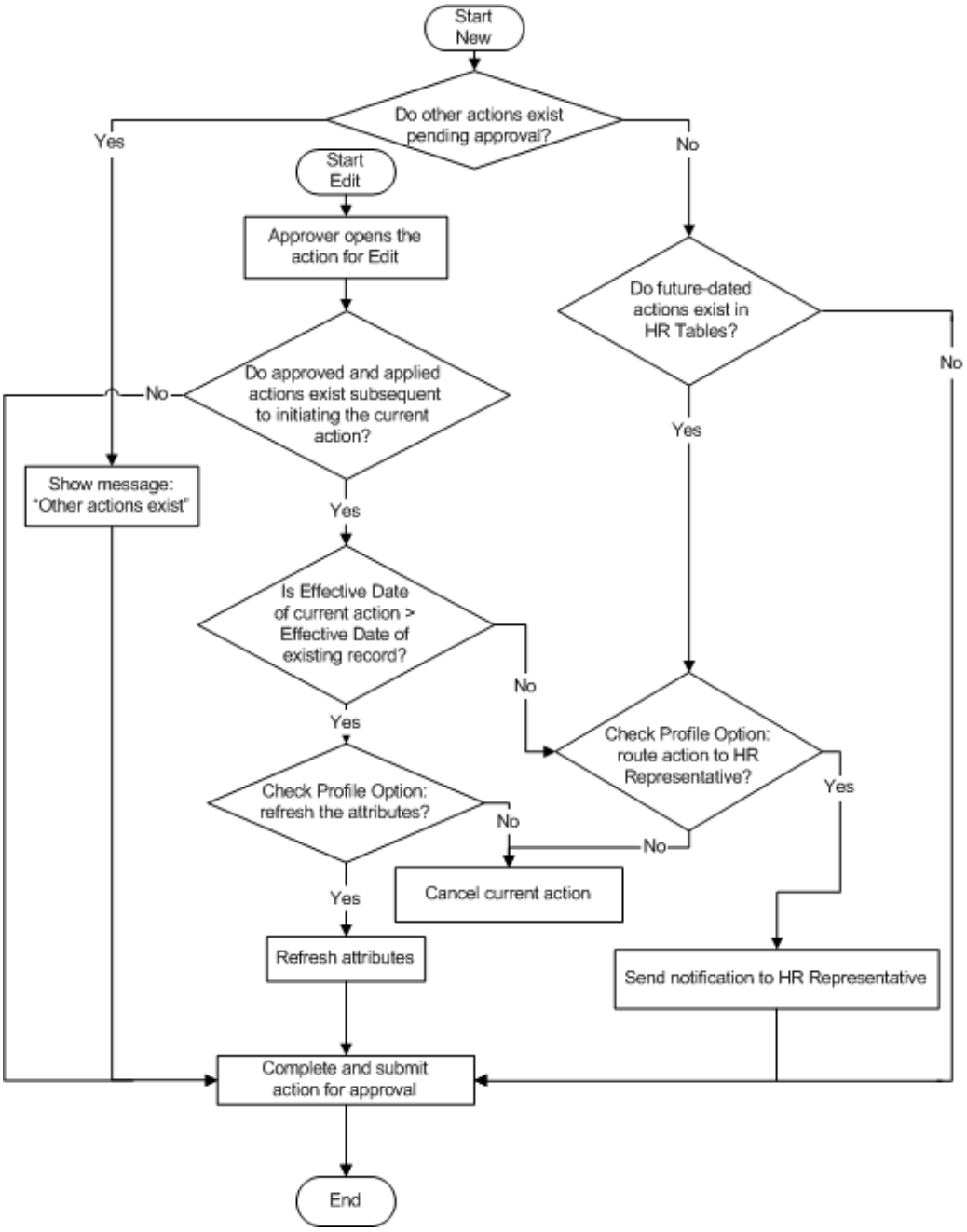
No automated system can resolve every scenario involving conflicting data. In some cases, an HR representative applies all appropriate changes manually. On the whole, managers prefer to get their actions in process and approve them. Your configuration accommodates most scenarios automatically by setting the following options:

1. Refresh your action with valid information as of your effective date, or require that your action fail on final approval (intervening actions)

2. Allow approval of your action with subsequent routing to an HR representative, or terminate it with an error (future-dated actions)

The process flow diagram below describes in greater detail how the application manages data conflicts when intervening or future-dated actions exist. The figure assumes that concurrent transactions are allowed.

Managing Conflicting Actions



Note: If an action has an effective date matching that of an existing change, the application assumes it to be a correction to the existing record.

For more information about date tracking in Oracle HRMS, see the Oracle white paper,

How Date Track Works, available on My Oracle Support.

Initiating a Self-Service Action

Oracle delivers a powerful and flexible set of tools in self-service actions. Your implementation team has many options to choose from as it decides which features are available, and how your process flow looks and feels. The following sections describe how to initiate an action, and possible exceptions resulting from implementation choices.

Enter Process Page

Begin a self-service action by opening a list of persons from the Main Menu.

Your implementation team chooses to display a supervisory hierarchy of your direct reports and subordinates, or a position hierarchy. You can also select a MyList view, displaying people you choose. Your implementation team determines whether the hierarchy or MyList view is the default. View options include expanding and collapsing nodes on the tree, and focusing on one person and his or her subordinates.

> **Note:** HR representatives typically use the MyList view to display people for whom they are responsible.

Your implementation team also determines whether multiple assignments appear in person/assignment combinations, and whether contingent workers appear.

Advanced Search criteria enable you to refine a person search by specifying criteria such as business groups, person types, department, or position.

To request a change, choose the Action icon associated with a person. The Actions page appears.

> **Note:** From any person/assignment row, you can optionally choose a Details icon that provides information about that person and assignment.

Navigation Options

Your implementation team may choose to display preselected actions on your Main Menu, consistent with older versions of SSHR. Oracle recommends that you open your person list by selecting Manager Actions from the Main Menu. From this single point of entry, you can see all available actions, and the selected person's eligibility for them. With preselected actions, you restrict yourself to the single action you have selected. If your selected person is ineligible, and your setup does not allow processing ineligible actions, you may have to begin again with a new action.

Note: Some processes are only available via preselected actions, such as New Hire or Organization Manager.

Selecting an Action

If you use Manager Actions to enter the process, the Actions page lists available changes, and the selected person's eligibility for them. Pressing the Start button initiates the selected action, and the Effective Date page appears.

Note: If you use a preselected action from the Main Menu, and no pending actions exist for your selected person, the application skips the Actions page and takes you directly to the Effective Date page.

Eligibility Processing

Your implementation team can configure the application to determine your selected person's eligibility for a proposed action automatically. The application determines eligibility as of the effective date you specify, and displays the results in a table on the Actions page. Eligibility determination is based on personal, employment, or derived-factor criteria, such as Job, Organization, or Length of Service. The process also considers department- or locality-specific criteria to determine eligibility for actions such as Promotion (Sales), or Hire (France).

Infrequently, the selected person may be eligible for more than one version of an action, such as Promotion (Sales) and Promotion (US). In most cases, well-configured eligibility processing will present only one action as a choice. If the person is eligible for more than one version of an action, you select from a list of choices on the Sub-Actions page.

Your implementation team can configure the application to process ineligible actions. For example, you can do this if approvers have the right to override eligibility criteria, or if you want to put an action in process for a person who is not eligible as of the effective date, but may become eligible later.

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

Processing Your Action

When processing your action, you need to know how the application manages data conflicts. If your implementation team has configured the application to support concurrent actions, you may encounter messages and warnings about other pending actions on the selected person's record, or actions on this person you have saved for later. The Actions page displays two lists of pending actions on the selected person:

- your own actions

- actions awaiting the approval of others

You can also see a complete list of your own pending actions by choosing Actions Requiring Your Attention from the Main Menu. The application may also encounter intervening or future-dated changes that affect a proposed change, some of which may appear after your action is in the approval process.

See: Managing Conflicting Actions, page 2-148

Effective Date Page

Initiating or approving an action typically begins on the Effective Date page, where you choose one of two options:

1. Enter an effective date manually
2. Specify that the action takes effect on approval

This page also provides information and warnings relating to your action, such as the earliest possible effective date, or other approved or pending actions on this person.

> **Note:** If your implementation team decides to have all actions take effect on approval, the Effective Date page does not appear.

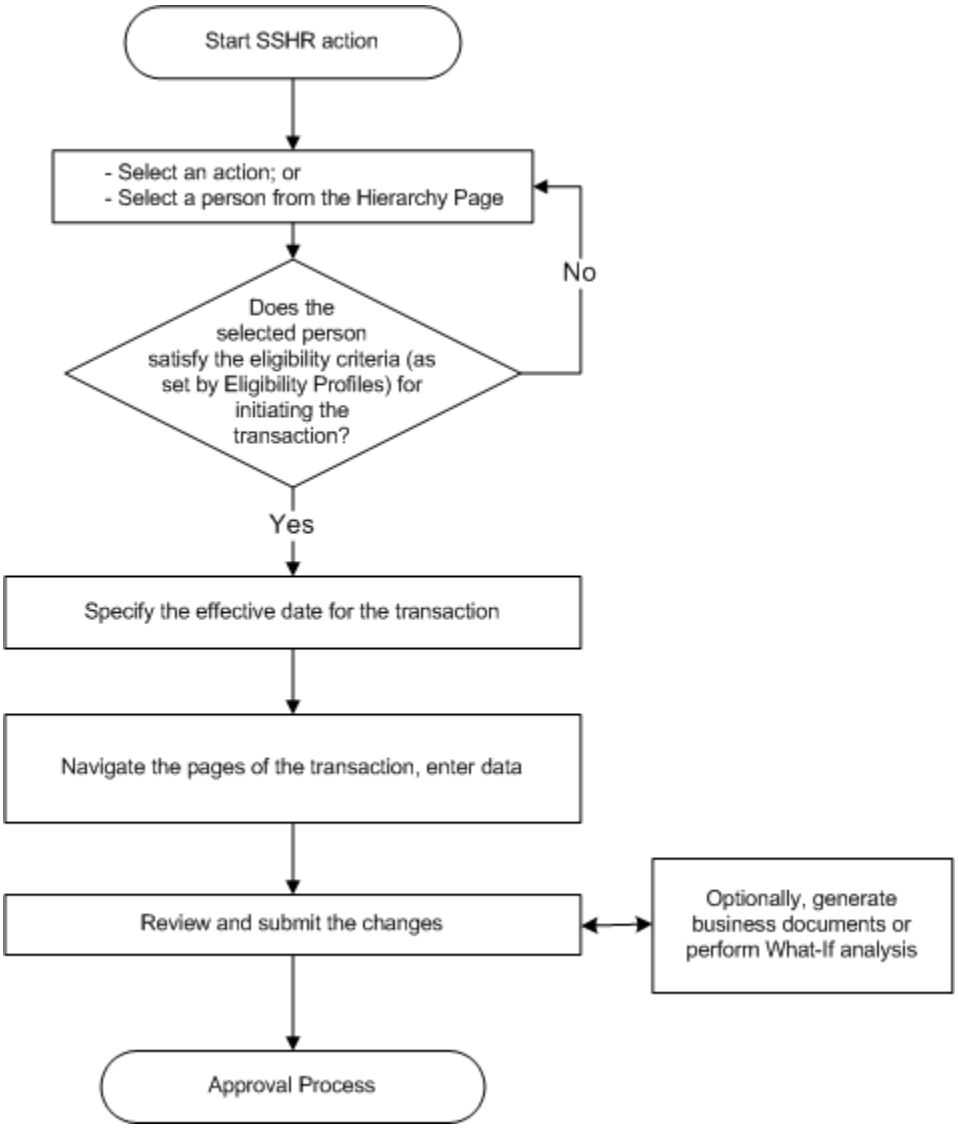
Business Process

Here you enter data related to your action. Available actions may differ, depending on the business processes your implementation team has provided. Examples include:

- Hire a person
- Change location
- Change manager
- Change grade
- Change salary
- Change job
- Change hours
- Award bonus
- Release information for transfer
- Initiate Leave of Absence

- Termination

SSHR Actions



Save for Later

If you Save for Later at any time in the process, you receive a notification as a reminder. If you inadvertently close your browser, or your browser crashes, the application saves your action for you.

Canceling an Action

If you are the Initiator, pressing the Cancel button deletes the action. If you are an approver, or have Saved for Later, Cancel reverts to the previously saved data.

Review Page

In addition to displaying the proposed changes to the person's record and information about the approvers on the chain of recipients, the Review page gives you the opportunity to choose additional approvers, or add people to notify. Other available features include:

- Attachments
- What-If Analysis
- Document Management
- Approvals Management

Press the Submit button to send your action to the next approver on the chain. If you are the final approver, you submit the changes to the database.

Attachments

The Review page includes an Attachments link, which enables you to attach supporting documents, such as a photograph, a copy of a degree or certificate, or a resume. You need update privileges to do this. Oracle does not predefine any document types, so your implementation team supplies the list of available types.

"What-If" Analysis

If you choose the What-If Analysis link on the Review page, the application displays information about your selected person's entitlement to compensation and benefits. Choosing this link runs the BENMNGLE process, which gathers and reports information about compensation objects relating to the person's entitlements. Use this page to assess the impact of your proposed action. Here you can review the unit of currency, current amount, current period, What-If amount, and What-If period.

> **Note:** Performing What-If analysis requires that you run Oracle Advanced Benefits.

Business Documents

Your implementation team can create formatted business documents in Acrobat PDF

format, and associate them with selected actions. The application can also include information from your action in the document automatically. For example, documents available for your use could include a Request for Change, Notification of Change, letter, or contract describing the changes to the person's status, such as a new job or effective date. Your setup can provide pre-approval and post-approval versions of a document. If you press the Printable Page button on the Review page, you will see a list of pre-approval documents associated with your action that are available for printing. If no documents are available, pressing Printable Page displays a printer-friendly version of the Review Page.

On final approval, the Initiator receives a notification with a link to a list of available post-approval document versions.

Approving a Self-Service Action

Approvals Management

SSHR actions use Oracle Approvals Management (AME), a rules-based expert system, to route actions via supervisory hierarchy (default), or routing list. Your implementation team can define business rules that generate a routing list automatically, ensuring that SSHR routes your action to the appropriate parties for approval. Your setup can designate approvers who record decisions by external authorities, such as unions or workers councils.

Pressing the Submit button on the Review page sends your action to an approval process that chooses the appropriate approvers automatically. Approvers receive a notification in their Worklist with a link to open the action, and (with update privileges) they can edit, change the effective date, or attach supporting documents. Approvers can return the action for correction to any previous approver on the chain. If you are the final approver, pressing Submit applies the action to the database.

> **Note:** If the database encounters intervening approved actions on your selected person, workflow sends the action to a Human Resources representative on final approval for manual entry of all appropriate changes. You see a warning message if this is the case.
>
> See: Managing Conflicting Actions, page 2-154

The Review page also provides options to add approvers and select additional notification recipients.

Notifications

Workflow users receive notifications in their Worklist. Standard formats include:

- Approval Required

- Saved for Later
- Return for Correction
- FYI
- Queries from other approvers

When an approver or HR representative retrieves a notification requiring approval, the Notification Details page appears, providing notes and warnings related to the action. Notification Details provide the following options:

- Approve
- Reject
- Reassign
- Request Information
- View Action
- Update Action
- Return for Correction

Most options include an opportunity to provide comments or ask questions.

Updating an Action

Unless your implementation team has decided to have all actions take effect on approval, the Effective Date page appears when an approver opens an action. Any approver in the chain of recipients with update privileges can change the effective date here. Approvers may see messages or warnings about intervening or future-dated actions that the database has encountered. See Managing Conflicting Actions, page 2-154

Return for Correction

Any approver can return an action for correction to any previous approver on the chain. In order to make a change, recipients must have a workflow role that grants update privileges.

Transaction Data Changes in FYI Notifications

The FYI notifications display changes to the transactions that are either approved or rejected. The FYI notifications page displays a region with Proposed column to view transaction data changes and a Supporting Documents region to view any attachments

added to the transaction. If any attachments are added to a transaction's Review page, then these attachments appear as a link on the FYI Notification page. For example, after a manager approves a leave of absence transaction, the recipient who receives the FYI notification can view the absence details that have been approved. The recipient need not navigate to the relevant self-service pages in the application to understand the changes that have been approved.

> **Note:** The FYI notification page displays transaction data changes only if the value of the pNtfFyiDetails function parameter is set to Y for form functions.
>
> See: Menu Function Parameter Descriptions, *Oracle SSHR Deploy Self-Service Capability Guide*

Schedules and Availability

Overview of Availability, Schedules, and Calendar Events

The availability of a person depends on their work schedules, absences, and holidays that affect their time. For an enterprise, availability information is essential in a number of business processes. For example, when you approve an absence, you may need to know the worker's schedule to consider their commitments, the availability of other people in their team, and any holidays, such as a planned company closure that affects their time.

Oracle Applications provide alternative ways to set up and record schedule information in your enterprise. The decision for which method you set up is based on your knowledge of which applications use which information.

- Use OTL to set up information such as holiday calendars, shifts, and work plans.

  For information on the OTL time management structures, see: Time Management Structures, *Oracle Time & Labor Implementation and User Guide*

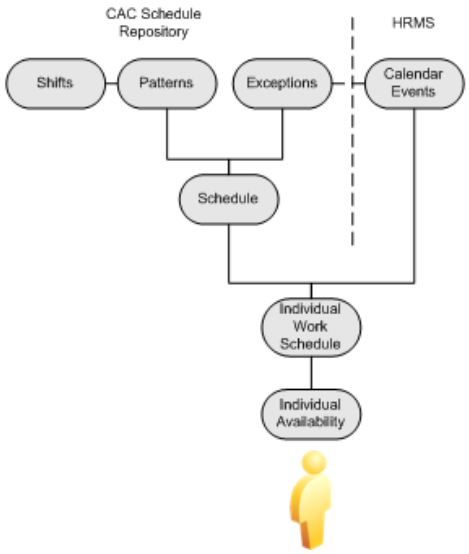
- Use Oracle HRMS to set up basic schedule information in various areas of your work structures, such as default working hours for your business group, that you use for information purposes only.

- Use the Oracle HRMS and Common Application Components (CAC) integrated features to set up extensive schedule information, such as, shifts, schedules, and calendar events. The HR application uses this method to determine a worker's availability, if you do not use OTL. This topic focuses on this method of setting up schedule information.

Oracle HRMS and CAC enable you to set up information to determine a worker's availability. Using the CAC schedule repository, you define a worker's schedule and availability and publish it for the eBusiness Suite. Using HRMS calendar events, you define the holidays that affect the availability of your workforce.

The following diagram displays the Oracle HRMS and CAC features you can set up to determine a worker's availability.

HRMS and CAC Integrated Availability Features



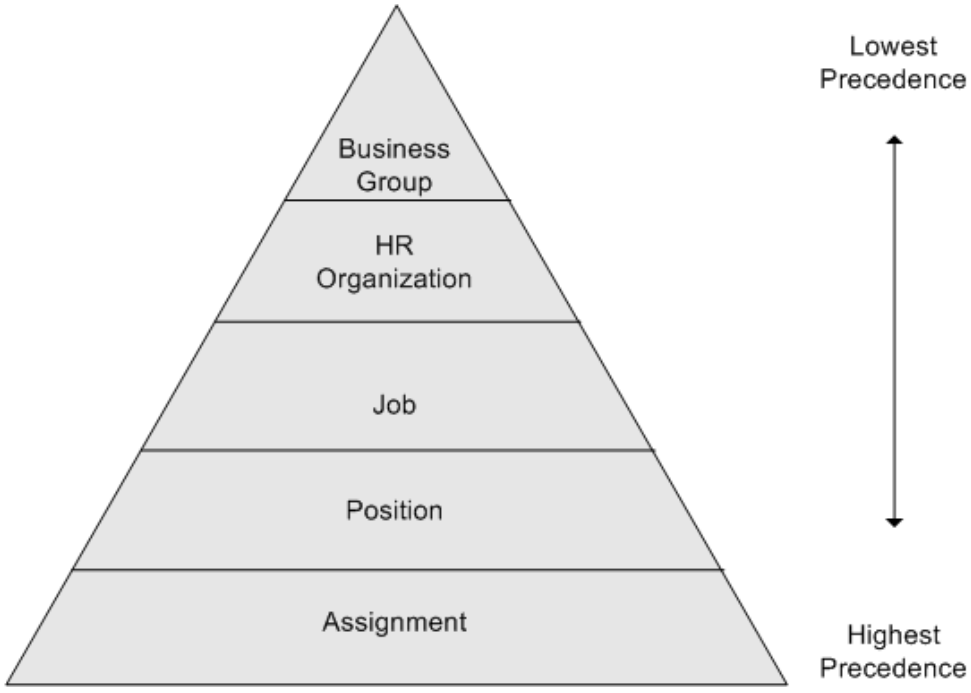
Schedules

Schedules include details of available and unavailable working times for a resource for a specified period of time. You define schedules to suit the different groups of people in your workforce. For example, you can set up a regular schedule of 9-5, for five days a week, starting on Mondays, and assign it to all the workers who work a regular week. You store the schedules in the CAC schedule repository.

See: Overview of the Schedule Repository , *Oracle Common Application Components User's Guide*

For the HR application to determine a worker's availability effectively, you must have assigned a schedule to them. To ensure that you have assigned a schedule to your workforce, assign a schedule to the business group. This creates a default schedule for your workforce to inherit. You can also assign schedules at the HR organization, job, position, and assignment levels, which enables you to override the default schedule and define schedules for different groups of workers. When determining a worker's availability, the application searches for the worker's schedule starting from the lowest level first. The following diagram displays the different levels at which you can assign a schedule, the order in which the application finds the information, and the order of precedence.

Schedule Precedence



Schedule Eligibility

If you directly assign a schedule to a worker's assignment, then you can, optionally, filter the schedules so that only the schedules the worker is eligible for display. For example, you can use schedule eligibility to define an eligibility profile for all the workers in the UK. When you assign a schedule to a UK worker, you can use this eligibility to ensure you only see this type of schedule. A worker becomes eligible for a schedule if you attach an eligibility profile to the schedule and the worker meets the eligibility criteria in the profile. This is an optional tool to help you restrict the number of schedules the HR application retrieves, it does not prevent you from overriding the eligibility.

Exceptions

An exception is an override of an existing schedule pattern. A holiday is an exception that changes a normal work day to an unavailable work day. An exception can also change a normal non-work day, such as Saturday, to an available work day. You can set up company holidays as global exceptions, which you can incorporate into any schedule. You can also create exceptions that apply only to a particular schedule during the schedule creation process.

Calendar Events

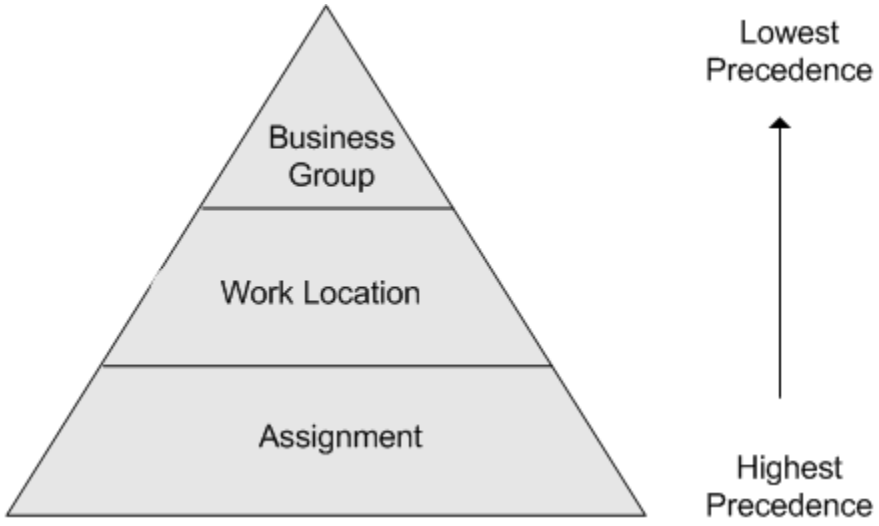
Calendar events represent all the important dates that can affect the working time of your workforce such as a public holiday. You define the coverage of an event using geographical and organizational hierarchies to identify the group of people to whom the event may apply.

The calendar events that apply to a person depends on which organization and geographical node their primary assignment is associated. For example, if you are a multi-national enterprise and you want to schedule a global event, then you can attach the event to the top-level node of the geographical hierarchy. This enables you to define a calendar event and apply it to all the countries in which you employ people at the same time, rather than defining separate events for different countries or regions.

Using this example, each worker's assignment is included in the event's coverage, however, the worker may not be impacted by the event. A calendar event only impacts a worker's time if they are scheduled to work at the same time as the event and if the event is defined as an exception to the schedule.

If you use the geographical hierarchy as the type of coverage, then the HR application uses the business group's legislation code to determine the country in which the person works in their primary assignment. If the event includes that country, then the event becomes applicable for the person. You can override this default by using the location and assignment EITs to identify a different geographical node in the hierarchy. To determine if a calendar event is applicable to a worker, the application uses the geographical node at the lowest level. The following diagram displays the levels you can use to identify a geographical node in which a worker belongs. The lowest level is the assignment EIT, which overrides the information defined at the location and business group levels.

Geographical Precedence



An event only impacts a worker's day if they are scheduled to work during that time. For example, you create a public holiday calendar event for Christmas day and attach it to the UK node of the geographical hierarchy. Person A and Person B both work in the UK for the same company. Person A works in the factory and is on a shift- based schedule of four days working and four days not working. Person B works in the administration department and is on a Monday to Friday schedule. Person A is required to work on public holidays, and Person B is not. Christmas day is on a Thursday, so does this event impact their working day?

The HR application determines which events apply to each worker. Person A is required to work public holidays so if Person A is scheduled to work on a Thursday, then no, this calendar event does not impact their working day. Person B is not required to work on public holidays, and as Person B is scheduled to work on a Thursday, the event does impact their working day. Therefore, Person A is available to work on Christmas day, and Person B is unavailable.

Viewing Availability

Setting up schedules and calendar events for your workforce enables you to view a person's working time, and furthermore, find out when they are available or unavailable to work. You can display a person's availability in the Review Resource Availability based on their assignment and date range. The application searches the person's applicable schedules and calendar events within the dates you specify, and displays the results in a table.

Setting Up Availability

You can use the integrated features from Oracle HRMS and Common Application Components (CAC) to set up information such as shifts, schedules, and holidays to help you determine a worker's availability.

See: Overview of Availability, Schedules, and Calendar Events, page 2-167

Use the following steps to set up availability in your enterprise:

1. Set up holidays and important dates in your enterprise as calendar events.

   See: Setting Up Calendar Events, page 2-173

2. Set up the schedules you require in your enterprise. For example, you can define a schedule with a shift pattern of five days a week for all the people who work in the sales organization. You can define as many schedules as you require.

   See: Creating Schedules Business Flow, *Oracle Common Application Components User's Guide*

   See: Creating Flex Time Schedules Business Flow, *Oracle Common Application Components User's Guide*

   Set Up Schedule Eligibility

You can perform steps 3, 4, and 5, to ensure that when you associate a person to a schedule, only the schedules that the worker is eligible for display. This is an optional tool to help you restrict the number of schedules the HR application retrieves, it does not prevent you from overriding the eligibility.

3. Define eligibility profiles to restrict employee eligibility for particular schedules.

   See: Schedule Eligibility, page 2-169

   See: Defining an Eligibility Profile , *Oracle HRMS Compensation and Benefits Management Guide*

4. Attach the eligibility profiles to your schedules in the Manage Profiles pages.

5. After you assign the eligibility profiles to your schedules, you run the Eligibility Engine process in the Submit Request window.

6. Assign schedules to the business groups in your enterprise. To effectively determine a worker's availability, the worker must have a schedule assigned to them. The schedule you assign to the business group becomes the default schedule. You can override the default schedule and define different schedules for different groups of people by assigning a schedule at the HR organization, job, and position levels. The HR application uses the schedule you define at the lowest level to determine the worker's availability.

   Note: The location option is for a future release.

   See: Schedule Precedence, page 2-168

7. Assign schedules to workers directly if you do not want them to use the default schedules you set up at higher levels.

   See: Assigning a Schedule to a Worker, page 2-174

8. Set the HR: Schedule Based Absence Calculation profile option to Yes if you want the HR application to use the worker's schedule and calendar events from their primary assignment to calculate absence durations.

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

   If you do not want the application to use the schedules and calendar events information to calculate absence duration, then you can create a basic formula to calculate absence duration from the absence start and end dates. Set the profile option HR: Absence Duration Auto Overwrite to Yes if you want to automatically update the absence duration calculation each time you change the absence dates.

   See: Writing Formulas To Calculate Absence Duration, *Oracle HRMS Compensation and Benefits Management Guide*

9. Verify your schedule and calendar event setup is correct by searching on a person's assignment in the Review Resource Availability page. The application searches the person's schedules and applicable calendar events within the dates you specify, and displays the results in a table.

What's Next?

When you complete the calendar event and schedule setup, you can:

- Review a worker's applicable calendar events in the Review Applicable Events page. A worker is applicable for certain events depending on their work schedule, their geographic location, and the organization hierarchy to which they belong. If any of these components change, for example, the person transfers to a new organization, then the calendar events that apply to the new organization are automatically applicable to the person.

- Find out if a person is available to work within a specific date range by displaying their schedules and applicable calendar events based on their individual assignment, in the Review Resource Availability page.

Setting Up Calendar Events

Use calendar events to define dates such as public holidays and other important dates such as a company-wide day off from work. You use organizational and geographical hierarchies to identify the group of workers to whom you want the calendar event to apply.

The calendar events you set up become applicable to your workforce depending on the type of coverage you select. The calendar event becomes applicable to the worker if the event covers the country or organization in which they work. A calendar event only impacts a worker's time if they are scheduled to work at the same time as the event and if the event is defined as an exception to the schedule.

Depending on the structure of your enterprise and the types of event you want to set up, you can review and use both types of hierarchy. For example, you can use the geographical hierarchy for all your public holiday calendar events, and the organizational hierarchy for all the calendar events that are relevant to your enterprise.

See: Calendar Events, page 2-170

Use the following steps to set up calendar events in your enterprise:

1. Review the organization hierarchy you want to use for your calendar event coverages.

   For each calendar event you define, you select either a geographical or organizational hierarchy as the coverage type.

   See: Launching a Hierarchy Diagrammer, *Oracle HRMS Enterprise and Workforce Management Guide*

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

2. Review the geographic hierarchy and, if required, add the countries you want to use for calendar events as additional nodes. You can also set up geographic nodes lower than the country level. For example, if you have a public holiday that applies to people in a particular state, then you can define the state in your geographic hierarchy.

   See: Generic Hierarchies Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Define the Geo Node Location EIT if you want to identify a different geographical node in the hierarchy for a location, to override the country you specified at the business group level.

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

4. Define the Geo Node Assignment EIT if you want to identify a different geographical node for specific assignments. The assignment EIT is the lowest level you can use to identify a different geographic node on the geographical hierarchy. The HR application uses the information you defined at the lowest level to determine if the event is applicable for the worker.

   See: Geographical Precedence, page 2-170

5. Define the calendar events and coverages for your enterprise in the Calendar Event Entry pages.

   Tip: If you want to define calendar events for a recurring public holiday, such as Christmas Day, then you can use the same name with different dates. For example, create Christmas Day as a calendar event from 25-Dec-2006 to 25-Dec-2006 and define another event as Christmas Day from 25-Dec-2007 to 25-Dec-2007.

6. Run the HR Calendar Coverage Cache Process using the Submit Requests window to build the event repository, which makes them available for other applications to use.

7. Verify that you have set up the calendar events correctly in the Review Calendar Event Coverage page.

Assigning a Schedule to a Worker

You can define schedules and assign them to your business groups, and optionally your

HR organizations, jobs and positions to ensure your workers inherit the appropriate schedule. You can additionally assign a schedule to a worker directly if you do not want them to use the default schedules set up at higher levels.

See: Schedule Precedence, page 2-168

To assign a schedule to a worker, you use the Assign Schedules and Manage Exceptions pages using the HRMS Manager, Manager Self-Service, or HR Professional responsibilities.

1. Query the worker to whom you want to assign a schedule.

   If a worker has multiple assignments, then you can assign schedules to each assignment. However, when the HR application calculates an absence duration, it uses the schedule information from the worker's primary assignment only.

2. Assign schedules to the worker and select the Publish Schedule option to identify the primary schedule for the worker, for the specified dates. The HR application publishes the primary schedule to the Common Application Components (CAC) schedule repository for other applications in the eBusiness Suite. Applications use the primary schedule to determine the worker's availability.

   You can assign multiple schedules with the same category to the worker and select the Publish Schedule option, as long as the dates do not overlap. You can also assign schedules with different categories with dates that do overlap.

   Select the Eligible Schedules Only option if you previously defined and assigned eligibility profiles to your schedules. This is an optional tool to help you restrict the number of schedules the HR application retrieves, it does not prevent you from overriding the eligibility.

   See: Schedule Eligibility, page 2-169

3. Define any assignment-level exceptions. For example, you can define a training day as an exception to the worker's schedule.

4. Attach any exceptions you previously defined to the worker's schedule. This option enables you to directly assign an exception or calendar event to the worker's schedule. If you have already defined exceptions for the schedule, they appear in the Exceptions table.

   See: Exceptions, page 2-169

   See: Calendar Events, page 2-170

Workforce and Applicant Termination

Workforce and Applicant Termination

Every enterprise needs to be able to terminate employees, contingent workers, and applicants.

Terminating an Employee or Contingent Worker

When an employee or contingent worker leaves your enterprise you terminate them. Oracle HRMS enables you to terminate an employee or contingent worker by entering a termination date. This is the minimum amount of information required for a termination. You can record further information, including:

- Reason for termination (including death)
- Date notified (employees only)
- Final payroll processing date (employees only)
- Terminated user person type
- Terminated assignment status (employees only)

See: Ending Employment, page 2-178

See: Ending a Placement, page 2-181

Terminating an Employee or Contingent Worker with Multiple Assignments

If your organization uses multiple assignment functionality, you should take extra care when terminating an employee or contingent worker. If assignment-level security is enabled, you should only terminate an employee or contingent worker if you have access to the primary assignment for that person. To avoid the situation where a manager without access to the primary assignment terminates a person, Oracle recommends that you carry out the termination process in Self-Service Human Resources (SSHR) using the Self-Service Actions functionality.

For more information on security, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

For more information on the Termination process in SSHR, see: Termination, *Oracle SSHR Deploy Self-Service Capability Guide*

Terminating an Assignment

Each employee and contingent worker in Oracle HRMS must have at least one active assignment.

If a person has more than one active assignment, you can end any of their individual assignments by selecting an assignment status of End or Terminate Assignment for employees, or an assignment status of End for contingent workers, in the Assignment window. (For employees, the assignment status End ends the assignment immediately. The assignment status Terminate Assignment leaves the assignment effective but changes its status from Active to Terminated.) At least one assignment (the primary assignment) must remain active. If you want to end all assignments at the same time (or end the primary assignment), you must terminate the employment or placement, otherwise a warning is displayed.

Mexico only: When you terminate an employee, or an employee's secondary assignment, you must provide a Social Security Leaving Reason.

If you use Oracle Payroll, you can choose to include the employee assignment in a payroll run after the assignment has ended.

See: The Employee Assignment, page 2-61

See: Ending an Assignment, page 2-133

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

Terminating an Application

When you reject an application for employment you terminate the application. Oracle HRMS enables you to terminate a single application from an applicant with multiple applications or terminate all outstanding applications for an applicant. You can terminate applicants even if future changes, such as application status updates, exist for the person after the proposed termination.

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

If you want to terminate all applications for an applicant you can do this by entering a termination date. This is the minimum amount of information required for this type of applicant termination. You can choose to record further information including:

- Reason for rejecting the application
- Terminated user person type

- Terminated applicant status

See: Rejecting an Application, page 1-20

You can also use Oracle HRMS to trigger the generation of a formal rejection letter.

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

Canceling a Termination

There are a number of reasons why you may want to cancel a termination for an employee or contingent worker. For example, an employee may decide not to leave, the date of leaving may change for a contingent worker, or you may have terminated an employee or contingent worker in error. In each of these cases Oracle HRMS enables you to cancel or *reverse* a termination.

See: Canceling a Termination, page 2-181

Ending Employment

If an employee is leaving your enterprise or agency, you *terminate* them in the Terminate window. The ex-employee's records remain in the application. You can reinstate, or rehire, the person to create a new period of service.

Many Oracle Applications work with employees as of dates in the future. This means any future date terminations you enter here are reflected, and the employee with the future dated termination are not available in such cases. You should take this into account when dealing with terminations where the end date is a sensitive piece of information.

The Final Process date is the last date on which you can process payments for a terminated employee, if you are using Oracle Payroll. To process unanticipated late payments or to make corrections, you can change the Final Process date, provided the new date does not conflict with other information held for the employee.

See: Updating an Employee's Final Process Date, page 2-182

> **Note:** If you perform a *back-to-back* rehire, an ex-employee person type is not recorded for the employee's first period of service. This is because there is no period of time when the employee exists as an ex-employee.
>
> See: Rehiring an Ex-Employee, page 1-28

You can also reverse a termination reinstating elements assigned to the employee prior to termination action being taken.

See: Canceling a Termination, page 2-181

Note: If you mistakenly add someone to the application, or if you want to remove all records for an ex-employee, you can *delete* the person in the Delete Person window. However, you cannot delete an employee whom Oracle Payroll has processed in a payroll run.

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

If you mistakenly hire an applicant, you can cancel the hire in the Person window.

See: Canceling a Hire, page 1-30

Terminating an Employee

To terminate an employee:

1. Enter the reason for the termination. You can define valid reasons as values for the Lookup Type LEAV_REAS.

   This is an optional step.

   Note: When you enter a termination reason of "Deceased" and an actual termination date, if you have not entered an employee's date of death in the Other Information tabbed region of the People window, this date is set to the actual termination date.

   UK Payroll only: If the employee is deceased, you must select the reason Deceased. This records the information on the P45. If the employee is retiring, you must select the reason Retirement. This automatically creates a retiree person record that can be used by your benefits department to trigger payments such as pensions.

2. Enter the termination dates. Only the Actual date is required. This is the date when the employee's person type changes. The Notified and Projected dates are for information only. The Last Standard Process date is the last date for normal processing, while the Final Process date is the last date for late payments.

   For the Final Process date:

   - If you need to process pay for the employee after termination, set the Final Process date later than the Actual date, or leave it blank.

   - If you do not need to continue processing, set the Final Process date to the Actual date.

     Note: The Final Process field is enabled at all times, you can change the value subject to other information held for the employee. The Final Process date need not be equal to the Last Standard Process

date.

The application closes the element entries on the Last Standard Process date, the Actual date, or Final Process date, depending on how you have defined the elements.

3. **Canada only**: Click inside the Further Information field, and specify the ROE Reason and ROE Comment. The ROE Reason appears in Block 16 of the ROE. The ROE Comments appear in Block 18 of the ROE.

   India only: Click inside the Further Information field and specify the leaving reasons. The PF Print Leave Reason appears on the PF Monthly Returns Print report and the PF e-File Leave Reason appears on the PF Monthly Returns e-File Report.

   Hong Kong only: Click inside the Further Information field and specify date of departure, reason for departure, country returning to, seconded to, returning to Hong Kong, probable return date, new employer name, address, and salaries tax borne by employer.

4. Select a terminated user person type in the Type field.

   Note: The Type field is only enabled when the Actual date is entered for the first time. When you enable the Type field, it is populated by the default value for your system person type of Ex-employee.

   Oracle HRMS assigns the person type you select to the person's record following termination. The person type is displayed as the Actual date plus one day.

5. Select a terminated assignment status in the Status field.

   Note: The Status field is only enabled when the Actual date is entered, the Final Process has not been entered, or the Final Process date has been entered but is different to the Actual date. When you enable the Status field, it is populated by a default value.

   Oracle HRMS uses the terminated assignment status you select for the primary assignment. This assignment status is displayed as the Actual date plus one day. If you update the primary assignment status, the Termination window still displays the status as the Actual date plus one day.

6. When the information is complete, choose Terminate to complete the termination.

Ending a Placement

When a contingent worker leaves your enterprise, you end the period of placement in the End Placement window. This action changes the person type to Ex-contingent Worker and ends all assignments.

The ex-contingent worker's record remains in the database. You can reinstate the person to create a new period of placement.

To terminate a contingent worker:

1. Select the termination reason.

   Note: If you select the termination reason Deceased but have not completed the Date of Death field in the Other tabbed region of the People window, that field is set to the actual termination date.

2. Enter the actual termination date.

3. Select a termination person type value.

   Note: You enable the Termination Person Type field only when you enter the actual termination date. When you enable the field, it contains the value Ex-contingent Worker (or your enterprise's user name for this person type) by default.

4. Choose the Terminate button to complete the termination.

You can reverse a termination for a contingent worker.

See: Canceling a Termination, page 2-181

If you mistakenly add someone to the database or you want to remove all records for an ex-contingent worker, you can delete the person in the Delete Person window.

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

Canceling a Termination

If an employee or contingent worker decides not to leave, or the date of leaving changes, you can cancel a termination. You can cancel a termination at any time provided you have not rehired or started a new placement for the employee or contingent worker.

Oracle HRMS reopens the assignments previously closed down and gives each assignment the status it had before termination. It also restores other information to its

state before termination. For example, it removes the end date put on recurring element entries for the assignment. Also, when you terminate an employee or contingent worker, future-dated changes on the assignment are not removed. This means that when you reverse a termination, Oracle HRMS reinstates the elements assigned to the employee or contingent worker prior to termination action being taken.

> **Note:** Any nonrecurring element entries that were deleted for processing periods after the termination date cannot be automatically restored. You must restore them manually.

To cancel a termination:

1. Choose the Reverse Termination button in the End Employment or End Placement window.

   > **Note:** The application clears and disables the Type and Status fields in the End Employment window and the Termination Person Type field in the End Placement window.

To change the termination date:

1. Cancel the termination by choosing the Reverse Termination button in the End Employment or End Placement window.
2. Enter a new actual termination date and choose the Terminate button.

Updating an Employee's Final Process Date

You can change an employee's Final Process date, subject to the following conditions:

- The Final Process date must be later than the Actual and the Last Standard Process dates.
- You cannot change the Final Process date to earlier than completed payroll actions.
- You must specify a value for the Final Process date if the employee has a later period of service.
- If you previously entered a Final Process date equal to the Actual date, you cannot change the Final Process date to later than the Actual date.
- If you previously entered a Final Process date later than the Actual date, you cannot set the Final Process date equal to the Actual date.

Note: If you must set the Final Process date equal to the Actual date since the employee has no activity or assignment between the two dates, the best practice is to reverse terminate the employee and terminate with the new dates. You can follow the same practice to change the Final Process date to later than the Actual or the Last Standard Process date (after previously entering them equal).

You can change the final process date even when it is equal to the last standard process date. The application applies the following rules when you enter the final process date:

- The final process date cannot be earlier than the last standard process date.
- The final process date can be equal to the last standard process date.

If you increase the Final Process date, the end date of the terminated assignment is automatically extended. If you make changes to the terminated assignment between the Actual and the Final Process dates, the latest date to which you can decrease the Final Process date is one day after the last change. For example, if the Actual date is April 10 and the Final Process date is April 15, and you make a change to the assignment on April 12, the latest date to which you can decrease the Final Process date is April 13.

US and Russian Payroll Only: If you rehire an employee before the Final Process date for their previous period of service, the employee has overlapping periods of service between the rehire date and the Final Process date. You cannot change the Final Process date to earlier than or equal to the Hire date for the next period of service since this causes a gap between the overlapping periods of service. Similarly, for non-overlapping periods of service, you cannot change the Final Process date to later than or equal to the Hire date of the next period of service since this causes the periods of service to overlap.

Use the Terminate window to update an employee's Final Process date.

To update an employee's Final Process date:

1. **US and Russian Payroll Only**: If you rehired the employee before the Final Process date for their previous period of service, the Terminate window displays the service dates for all the overlapping periods of service. The dates for the latest period of service appear by default. Scroll down for the earlier periods of service.
2. Enter a new Final Process date.
3. Click Save to apply the changes

Entering Contact Information

Contact Information Overview

Oracle HRMS enables you to record the ways in which you communicate with the people in your enterprise and the people whom they have a relationship with, such as an employee's partner.

Entering People as Contacts

You enter people as contact records to identify:

- People to contact in an emergency
- Dependents of the employed person
- Beneficiaries of certain benefits, such as insurance policies or stock purchase plans
- Individuals who receive a wage attachment payment

Entering Contact Information

Entering contact information includes entering contact details for the people in your enterprise, such as their home address. As an employer, you need to record contact details so that you can contact people either by email, phone, fax or post, and for reporting purposes. For example, in the Netherlands you must record a person's house number for social insurance reporting.

Entering Addresses (Address Window)

You can enter as many addresses as necessary for each person, using the Address window.

> **Note:** You cannot enter or update address information in the Address window for a contact who is also an employee or contingent worker. Instead, update the relevant employee or contingent worker record.

To enter an address for a person:

1. Select a national address style and click in the Address field.

   If a local address style exists for your country, it is displayed as the default.

Otherwise, the international style is displayed.

Finnish Users: To display the postal code and post office on the same row in line with the Finnish Address standard, the application displays them in the same field, separated by a space. If you are not using Finnish postal codes upload functionality, you must enter postal codes and post offices manually. See: Entering Postal Codes, *Oracle HRMS for Finland Supplement (My Oracle Support Note: 283510.1)*

Dutch Users: When you record foreign addresses, ensure you use the Dutch International address style. This address style enables you to report the address in the wage report in the required format.

US and Canadian users: There is a choice of US address style and International address style if you have Vertex geocode data installed. If you are not maintaining DTW4 data and do not want to enforce the strict tax validation, then you can disable this using the HR:Enable DTW4 Defaults profile option.

Singapore Users: When you record addresses for local employees, ensure you use the Singapore (Formatted) address style. This address style enables you to report the Primary address in the IRAS reports in the required format.

> **Note:** You can change existing address styles or create new ones if required. See: Changing Default National Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

A window opens with the address format for the country you select.

2. Enter your address information in this window.

> **Note: India Users**:If the city is Delhi, New Delhi, Mumbai, Bombay, Kolkata, Calcutta, Chennai, or Madras, the application sets the metro status to Yes, else it is set to No.

> **Note:** Use the Phone Numbers window instead of this window to record telephone numbers otherwise you will be maintaining two lists of numbers.

Kuwaiti users: You must select the Governorate (Muhafazat) for payroll processing.

UK users: If you enter the employee's address, then the first line is mandatory and the remaining lines are optional. If you enter the post code, then you must also enter the first line of the employee's address. If you enter the country in the first line, then you must enter the employee's address.

See: Adding Telephone Information, page 2-187

Dutch users: Ensure you enter house number information for the Notification

Social Insurance (NSI) reports. Use the House Number Addition field if your house number contains an alpha value. For example, if your house number is 5a, enter 5 in the House Number field, and a in the House Number Addition field. See the following topic for information on the NSI reports:

See: Social Insurance Reporting, *Oracle HRMS Payroll Processing Management Guide*

> **Note:** You must enter the postal code in the following format NNNNAA, for example, 1234AB.

Russian users: Ensure you enter the zip code for the Residential address category so that the code appears in statutory reports.

3. Choose the OK button. This returns you to the Address window.

4. Select an address type, such as home, or weekend, or business. You can only have one address of each type at any time.

   Singapore Users: If you use company quarters, be sure to choose this address type, so it appears in the A8A report.

5. Check the Primary checkbox to identify the person's main address. Otherwise, leave blank. By default, the first address you enter is the Primary address.

   Dutch users - Use the Population Register Address type to record an additional address. The NSI reports use this information to report to the Dutch population register.

   Only one address at any time can be a person's Primary address.

   Singapore Users: If you use the Singapore (Formatted) address, you must enter the block number or address number, the street name, and the postal code values within the address to ensure that the IRAS process validates correctly. If you enter the Unit Number, you must enter the Level (Floor) number in the XXX-XXXXX format.

6. Save your work.

To update the primary address:

1. Enter an end date for the existing primary address.

   Do not save.

2. Create the new primary address starting the next day and check the Primary Checkbox.

   > **Note:** An employee must always have a primary address, but you

cannot enter more than one primary address for the same time period.

3. Save the new primary address.

To change from an international to a local address style:

1. To change from a global (international) address style to a local address style, choose Change Global Style to Local. This button appears only when the current style is international.

   The Personal Address Information window appears showing the new address structure. Values in fields common to both styles appear in the new structure.

   If you choose Change Global Style to Local when there is no local style, Oracle HRMS displays an explanatory message and the style remains unchanged.

2. Complete the address definition, as appropriate.

3. Choose OK.

4. Save your work.

Adding Telephone Information (Phone Numbers Window)

You can enter multiple telephone numbers for people in the HRMS database. To enter telephone information for a person, use the Phone Numbers window.

Note: You cannot enter or update telephone information in the Phone Numbers window for a contact who is also an employee or contingent worker. Instead, update the relevant employee or contingent worker record.

To enter a telephone number:

1. In the Type field, select the type of the telephone device. For example, Office, Home or Fax.

2. In the Phone Number field, enter the telephone number. You can use any format for the telephone number unless specific instructions are listed below for your legislation.

   US Users: You must enter telephone numbers in one of the following formats to ensure they are included correctly on the US Magnetic Reports (for example, the State Quartely Wage Listing).

- 222-333-4444X55
- 222-333-4444Ext555
- 222-333-4444-555

Any format is allowed.

3. In the From field, select the start date for the telephone number.
4. In the To field, optionally select the date when the telephone number is no longer valid.
5. In North America, optionally add the extension number in the last field.
6. Save your work.

   If you want to maintain a history of telephone numbers for this person, be sure to add a new entry for the new telephone number and enter an end date for the existing telephone number. If you do not want to maintain such a history, simply change the information for the existing telephone number.

   > **Note:** You can only have one active record for numbers with the types Home or Work. To add a new record for these types you must end date the existing record and begin a new record on the following day.

Entering Communication Delivery Methods

Within your enterprise you can contact your employees and applicants in a number of ways. For example, you could use E-Mail, Voice Mail, Fax or Post. Using the Communications Delivery Method window you can enter the different methods of contacting a person and indicate the method they prefer.

To enter a communication delivery method for a person:

1. Enter the methods of delivering information in the Delivery Method field. You can enter as many communication delivery methods as necessary.
2. Optionally, enter the period the delivery method is valid using the start and end dates. Otherwise, the start date is the effective date and the end date is not set.
3. Select a preferred communication delivery method, if your employee or enterprise prefers a particular form of communication. Each employee or applicant can only have one preferred communication delivery method.

4. Save the communication delivery methods for your employee or applicant.

Entering Next of Kin and Other Contacts

Use the Contact window to hold information about contacts, for example:

- People to contact in an emergency.
- Dependents.
- Beneficiaries of benefits such as insurance policies or stock purchase plans.
- Individuals receiving payment of a wage attachment/third party payment deducted from the employee's salary.

A person entered as a contact can be one, some, or all of the above.

The coverage start date for an employee contact, is the employee hire date or the contact relationship start date, whichever is later. This can be important in benefits processing, where eligibility for certain benefits starts from the start date of a contact relationship.

Creating The Same Contact Relationship More Than Once

You can set up the same relationship more than once between the same two people. However, these relationships must not occur in the same time period. For example, you can set up that Person A married Person B from 01-Jan-1990 to 01-Feb-1991. Person A could then marry Person B again, starting from the 02-Feb-1991. However, you cannot enter that the couple remarried on 01-Jan-1991, as this would mean that they were married twice in the same time period.

Updating a Contact Relationship Start Date to Make it Earlier

You can update the contact relationship start date between two people, creating a supplementary record to cover the additional period.

For example, Person A exists on the application as an employee with a hire date of 01-Apr-1990. Person B exists on the application as a contact, with a creation date of 01-Jun-1990. Person A then marries Person B on 01-May-1990. As the application holds a contact coverage start date of 01-Jun-1990, a new contact record is entered to cover 01-May-1990 and 31-May-1990.

To enter a contact:

1. Do one of the following:
   - Enter the name of a new person.
   - Select from a list of people already entered on the system.

2. If you enter a new person:

   - Enter their gender and date of birth.

     Important: For UAE users only, also enter the father, grandfather, and family name.

   - Select the user person type.

     You can only select user person types which are set up for the system person type of Other, for example contact.

3. Enter details about the different contacts for your employee in the Contact Relationship fields.

To enter contact relationships:

1. Select the contact relationship, for example child or spouse.

2. Enter the start and end date (if known) of the relationship.

   Note: For Dutch users only, if you set up a spouse as a contact for an employee, whose full name format includes partner's prefix and surname, the full name of the employee changes automatically based on the spouse's name, if the contact relationship covers the employee's full period of employment. If it does not cover the full period the changes to the full name of the employee must be set manually on all datetrack records.

3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end reason for the relationship.

4. Select whether the contact:

   - Is the primary contact.

   - Is the recipient of a third party payment (for example, from a court-ordered deduction/wage attachment).

     This enables you to select this person on the Personal Payment Method window when entering a third party payment method for the employee.

   - Shares the same residence as the employee.

   - Has a personal relationship with the employee. This identifies whether the

third party should be considered as a possible dependent and/or beneficiary.

- Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.

5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

   For example, Person A has a relationship type of spouse with Person B. This is given the sequence number of 1. Person A also has a relationship type of father to Person C. This is given the sequence number of 2.

   Person A also has a relationship type of emergency contact with Person B. This must also have the sequence number of 1 as a relationship between these two people is already recorded against Person A.

   Person B is also an employee and therefore has her own set of contacts recorded against her. She has a relationship type of spouse with Person A. However, this relationship does not have to have the same sequence number as the relationship recorded against Person A, that is, this relationship has a sequence number of 5.

6. Select whether you want to create a mirror relationship and enter the mirror relationship type.

   Important: You can only enter a mirror relationship and type when you first create the contact. Once the mirror relationship is saved, the relationships are maintained independently of each other, except for mirror relationships that are created automatically.

   Oracle HRMS automatically creates a mirror relationships when you enter a spouse, parent or child. For example, if you create the spouse relationship from person A to person B, when you query person B in the Contact window, a mirror relationship of spouse to person A is automatically created.

   Furthermore, if you update a relationship that has had a mirror relationship automatically created, the mirror is also updated accordingly. For example, if you end date the relationship of spouse for person A, the spouse relationship for person B is also ended. If the relationship type is changed the relationships become independent.

7. Enter further information about the contact if your localization team has setup the configuration of the further information field.

   For Spanish users only: Record if the contact (disabled dependant or a dependant) is financially dependent on the employee. The application uses this information to calculate the tax reductions the employee may be eligible for. You can also record if

the employee is a single parent as this affects the employee's the tax-withholding rate.

For Russian users only: If the contact type is child, indicate whether the child is in full-time education. The application uses this information to calculate the employee's tax reductions. You must also record any disability information for the child contact, as this affects an employee's social security contributions, tax, and leave benefits.

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

8. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, page 2-38

What Next?

If you want to enter addresses or phones for the contact, choose the Contact Details button.

Using People Management Templates

Template Windows User Interface

The following is an introduction to the windows that have been created from the example predefined templates. If you have been using the standard Oracle HRMS windows such as the People window, there are additional features that you need to be aware of:

- Configurable Find window
- Configurable Summary and Maintenance windows
- Graphical navigator
- Checklist tab
- Graphical timeline bar
- Actions button and Notify button

Find Window

The Find window enables you to perform detailed queries to find a person or group of people you need to work with. You can enter queries using basic search criteria such as name. You can also use advanced criteria such as grade ranges, or combinations of criteria (for example Job is Sales Manager AND Organization is not Northern Sales).

The Find window expands to display the results of the find when you choose the Find button.

To edit a person's details, select the record and choose the Show Details button. You can save the query, results, or a selection of the results into folders so that you can access those people again without performing the search again. See: Saving Search Criteria or Search Results to a Folder, page 2-214 for more information.

The Effective Date field must contain a value. This date controls which values are displayed in lists of values. It can differ from the date set in the calendar. However, when you choose the Find button, the effective date is set to what was entered in the Find window. If you do not enter a date, the current effective date from the calendar is used.

> **Important:** The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If

the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

See: Finding a Person or Group of People, page 2-199.

Summary Window

The Summary window enables you to browse and select records from the database using the Data Organizer, which is the navigator on the left hand side of the window. You can select a Person, Assignment, or Application in the Data Organizer to see a summary of information in the Details region. This window only enables you to make changes to the checklist information on the Checklist tab. You cannot edit a person's details using this window.

Data Organizer

There are three root nodes in the Data Organizer:

- People By Name (or People by Job, or People by Organization depending on what is selected in the View By poplist).
- Personal Folders, which you have created for your own use only.
- Public Folders, which have been created from the Find window and made public for everyone to see

People By Name, Job or Organization

By expanding People by Name, you can see folders in alphabetical order containing all the people in your security profile. You can order the information in this branch by name, job, or organization.

Personal Folders

There are two types of Personal folders:

- Search Criteria

  Search Criteria folders contain a query. They are dynamic. When you open the folder, the query is performed. This saves you re-entering commonly used queries in the Find window each time you need to use them.

- Group

  Group folders are static. They contain the groups of people you most commonly need to work with. You can create a Group folder by saving search results or pasting people in from other folders. People in a Group folder are sorted by name.

See: Saving Search Criteria or Search Results to a Folders, page 2-214

See: Managing Your Group Folders, page 2-200.

Public Folders

Public folders are Search Criteria folders that have been made available to all users.

Checklist Tab

The Summary and Maintenance windows can contain a Checklist tab. This contains checklist items set up by your system administrator to enable you to record the progress of tasks. For example, there might be a check to record that a job offer has been issued, along with a status and date.

> **Important:** The checklist is only a visual reference and does not perform any actions.

Actions Button

The Actions button on the Summary and Maintenance window enables you to perform tasks such as Activate Assignment or Hire Into Job.

The list of actions available depends upon the person type and their assignment status. For example, if you select an employee (not their assignment), the actions available are:

- Apply for Internal Vacancy
- New Assignment

If you select a contingent worker (not their assignment), an available action is:

- New Contingent Worker Assignment

If you select an employee or contingent worker assignment, available actions include:

- Make Primary Assignment
- Activate Assignment
- Suspend Assignment

If you select a secondary employee assignment, additional actions are available:

- Terminate Secondary Employee Assignment
- End Secondary Employee Assignment

Notify Button

The Notify button on the Summary and Maintenance windows enables you to send workflow notifications to other people. For example, when hiring a new person, you

might need to send notifications to security to organize a new security card and to inform the system administrator to set up a new account. You select the notification message and the person or role to send it to. You can preview the notification before you send it.

The notification emails are displayed in the Workflow Notification Mailer. See Oracle Workflow for more information.

Creating New Records

If you select People By Name, Job or Organization, you can also create new records. For example, you can create a new employee or new applicant depending on how the template restrictions have been set up. You can choose New from the toolbar or from the right mouse menu.

Maintenance Window

The Maintenance window enables you to enter and update information. The Maintenance window can contain tabbed regions each holding logical groups of information. Choose a tab to view the information in it. This window also contains a timeline bar that you can use to navigate to specific points in time such as a future date or the date of the last change to a record.

Correction or Update

The template window makes datetracked changes on a day-to-day basis in the same way as other datetracked windows. You can make datetracked changes to any of the fields on the window by using the option buttons to choose whether to update or correct information.

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

If you are trying to update the record and the system will only let you make a correction, check whether your effective date is the date of the last change. You cannot record two updates for one day, so the system forces you to correct the last update.

> **Important:** This interface only enables you to update or correct the latest information about a person or assignment. If there is a future change (after your effective date) to any personal information, all personal information fields are greyed out. Similarly, if there is a future change to any assignment information, all assignment fields are greyed out. To make complex retroactive changes to history, you must use the People and Assignment windows, where all the DateTrack modes are available for corrections.

Using the Timeline Bar

The Maintenance window contains a graphical timeline bar. The timeline is color coded to help you see when changes happened. You can move to a new date either by scrolling forwards or backwards using the arrow buttons or by entering a date and choosing the Go button. You can also click in the DateTrack timeline to move forwards or backwards in time.

You can choose to view specific changes on the timeline by choosing from the poplist next to the timeline bar. For example, you can choose to view changes only for Last name. You can then use the arrow buttons to navigate to the first, previous, next, or last change made to this field.

> **Note:** The fields listed in the poplist are defined by your system administrator in the template.

There can be a number of types of information included in the Maintenance window, depending on the template design, for example, personal information, assignment information, tax information. These types may have been updated at different times, so the date of the last update can vary depending on the type of information.

If a field is listed in the poplist next to the timeline bar, you can also view its DateTrack history by right-clicking on the field and choosing DateTrack History.

Accessing More Field Information Using the Right Mouse Menu

Your system administrator may have enabled the display of more information for some fields. For example, on the Job field you might be able to display the normal working conditions. To view this information, right-click in the field and choose the appropriate option from the right mouse menu.

Entering Employees Window

This window has been created using the pre-defined People Management template called Entering Employees.

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

- New employees
- Employment
- Office location
- Applicants

- Background checks
- Re-hire recommendations
- Further names
- Medical details
- Address details
- Telephone numbers
- Picture record
- Dependents, beneficiaries and other contacts
- Contracts

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

> **Note:** The system administrator can create customized versions of this window so that you use each version for certain person types only or for certain functions only (entering employees, entering applicants, or hiring applicants).

Folders for Saved Search Criteria or Results

You can save a query or the results from a query to folders so that you can quickly access the people you need to work with in future work sessions. The Find window in a template form enables you to do this. The folders are added to the Data Organizer on the Summary window. You can view the people in the Data Organizer by opening the correct folder. There are two types of folder you can use.

Search Criteria Folder

This type of folder contains the search criteria for your query, such as "find all employees assigned to the Northern Sales organization". The actual results are not saved in the folder. This type of folder is dynamic because each time you open it, the query is performed again. So you always get the most up-to-date results displayed in the folder.

You can save folders into the Personal Folders branch and they will appear on the Data Organizer when you open the Summary window. You can also make these folders public so that other users can access them.

Group Folder

When you perform a query using the Find window and the results are returned, you can save that set of results or a selection of the results in a group folder. When you open that folder in future, you will always see the same set of people even though some of the people may not meet the original search criteria when you look at the folder again.

You can build upon lists of people in group folders by copying and pasting people from one folder into another. For example, suppose you have two group folders containing a fixed list of people you regularly work with. You could cut the people from one folder and paste them into the other folder leaving you with just one folder to open. You can delete folders so you could remove the empty one.

> **Note:** You cannot make group folders public.

See: Saving Search Criteria or Search Results to a Folder, page 2-214.

Finding a Person or Group of People

If the Find window is not automatically displayed when you navigate to a template window, choose Find from the toolbar or from the View menu.

> **Note:** You may have a template in which there is no Find window, depending on how the people management templates are configured at your site. If the Find option is not available, you must select a person from existing folders in the Data Organizer.

This window enables you to find a person or group of people to work with. The Details tab is displayed by default to enable you to perform a basic query. For more complex queries, you can choose the Advanced tab.

To find a person or group of people:

1. In the Basic tab, enter the search criteria you want to query on. For example, enter the person's last name to find a person or enter a job title to find a group of people assigned to, or applying for, that job.

   You can enter values in as many fields as you require. The search finds people who meet all the criteria you enter.

   > **Note:** The Effective Date determines the lists of values available on fields in the Find window and which records will be returned. The date you set here also sets the calendar date when you choose the Find button. So if you navigate to another window, the date is

carried over to that window. If no effective date is displayed, the Find window uses the calendar date, which you can see by clicking the Calendar icon on the toolbar.

2. Optionally, choose the Advanced tab and enter more search criteria.

   For example, to find a person based on their grade, enter Grade is greater than on one line and Grade is less than on a second line. This restricts the query to a grade range.

3. Choose the Find button.

   If you have entered search criteria in both the Details and Advanced tabs, the search finds people who meet both sets of criteria. For example, if you entered Northern Sales in the Organization field of the Details tab and a grade range in the Advanced tab, the search finds people assigned to the Northern Sales organization within that grade range.

   The window expands to display your search results. The results are displayed in a folder so you can use the tools in the Folder menu to rearrange the columns, widen fields, and so on.

   Note: Choose the Clear button to clear all fields if you want to enter new search criteria.

4. To edit a person's details, select the row and choose Show Details.

   Important: The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

5. Optionally, you can save the query, the results, or a selection of the results to a folder, which you can use again See: Saving a Query or its Results to a Folder., page 2-214.

Managing Your Group Folders

You can copy people from any folder and paste them into Group folders. You can also remove people from your Group folders. You do this using the Data Organizer in the Summary window with the Cut, Copy, and Paste commands.

To cut or copy and paste people in folders:

1. In the Data Organizer, open the folder from which you want to copy or cut people.
2. Select the person or people you want to copy or cut.
3. Choose Copy or Cut from the Edit menu, toolbar, or right mouse menu.
4. If you are adding the person or people to another folder, select the group folder in which you want to paste them.
5. Choose Paste from the Edit menu, toolbar, or right mouse menu.

Note: To delete a group folder, see: Deleting a Folder, page 2-215.

Entering a New Employee

Three templates are provided in Oracle HRMS that enable you to enter employees. These are:

- **Enter Employees** - This is intended to be used by users who are only interested in entering new employees onto the system, for example data entry clerks. It only uses the Maintain window and includes all the fields required to set up an employee.
- **Maintain Employees** - This enables users to enter employees onto the system, and also to maintain existing records. It uses the Find, Summary and Maintain window to enable users to control a large amount of information relating to employees and their assignments.
- **Enter and Maintain Employees (HR Foundation)** - This template is included on the HR Foundation menu, but can also be used by people who have a full Oracle HR license. It uses the Find and Maintain windows and includes all the fields required to enter and maintain an employee. It has a very simple user-interface and does not have any date-track functionality enabled.

Your system administrator will have set up these templates according to the needs of your enterprise and will have restricted your access according to the role you have to perform.

To enter a new employee using the Enter Employees template:

1. If the New window is not displayed choose the New icon in the toolbar. Select New Employee.
2. Enter the personal details for the new employee. You must enter:

- name
- type
- gender
- employee number and hire date
- date of birth (for assignment to a payroll)
- BSN/SOFI number (Netherlands users only). By default this field is mandatory, however, you can change it to optional by setting the HR: Make National Identifier Optional profile option to Yes.
- Social Security Code (Hungarian users only)
- NIF Number (Spanish users only)
- Marital status and nationality (Polish users only)
- Family name (UAE users only)

All other personal information is optional.

3. Enter the assignment details for the new employee. You must enter:
   - organization (this defaults to the current Business Group)
   - professional category and contribution group (Spanish users only)

   You can also select other employment information, such as, job or position, grade, supervisor, and payroll details.

4. Your localization team may have created further tabs for you to complete. If you are a Belgian user, then on the Further Details tab, you must select the preferred correspondence language in the Communication field and the required business group in the Business Group Name field.

   If you are a Hungarian user then you must enter the tax identification number on the Employment tab and mother's maiden name on the Further Name tab.

   If you are a Spanish user then you must enter the work center to which the employee belongs. You can also specify if the employee has contributed towards social security for over 35 years.

   Netherlands users can enter the IZA participant number and specify whether the employee is on contract with another organization on the Further Details tab.

   Polish users can enter NIP (personal tax identifier) number and the legal-employer

name on the Employment Information tab.

If you are a UAE user, you must enter the following information:

- Nationality on the Additional Information tab

  Important: The Date of Change and Reason for Change fields are enabled only if you enter a nationality that matches the local nationality for the legal employer and a previous nationality for the employee.

- Legal employer name on the Employment Details tab

In addition, UAE users can also enter personal details such as first name, family, and mother's name in an alternate language on the Additional Name Details tab.

5. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

To enter a new employee using the Maintain Employees template:

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

   The Personal tab is displayed for you to start entering information about the employee.
4. Set your effective date to the date when you want the assignment to begin, such as the hire date You can enter a date in the Date field next to the timeline bar and choose Go.
5. Enter personal information for the employee. You must enter:
   - name
   - type
   - gender
   - employee number and hire date
   - date of birth (for assignment to a payroll)
   - BSN/SOFI number (Dutch users only)

- Mother's maiden name, tax identification number, and social security code (Hungarian users only)
- NIF number (Spanish users only)
- Marital status, nationality, and legal-employer name (Polish users only)
- Family name and nationality (UAE users only)

All other personal information is optional.

6. Choose the Communication tab if you want to enter contact information, such as addresses and phone numbers.

   Note: It is mandatory for Belgian users to select the preferred correspondence language in the Communication field on this tab.

7. Enter application information in the Assignment, Compensation, and Schedule tabs, as required.

   See: Entering Employment Information, page 2-204

8. Enter information in any other tabs that may have been created for your localization. For example, many localization teams will include an Extra Information tab to enable you to enter country-specific information.

   If you are a UAE user, you must enter the employer name on the Employment Details tab.

9. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

   If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See Multiple Person Records, page 2-38

Entering Employment Information

When you enter an employee or hire an applicant, Oracle HRMS automatically creates a default assignment for that employee. You can view and update the default assignment using the Maintain Employee windows.

To update employee information:

1. In the Summary window, use the Data Organizer to select the employee and choose

Show Details.

2. Set your effective date to the date the information should change.

3. Choose the Assignment tab. If the employee has multiple assignments you can select a different assignment from the drop-down list.

4. Select the organization to which you want to assign the employee. By default, the employee has an assignment either to the Business Group, or to the organization to which he or she was an applicant.

5. Select the job or position for which this person has been assigned.

6. Select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.

7. If a location is defined for the Business Group or other organization, it appears as a default. Change this, if required.

8. Check the Manager check box if the assignment is at manager level.

9. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee number, for the employee's first assignment.

10. Select a status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).

    See: Assignment Statuses, page 2-115

11. Select the employment category, for example part-time or full time.

12. Select the name and employee number of the employee's personal supervisor.

13. Choose the Compensation tab to enter a payroll, salary basis, or salary. The salary basis is the duration for which salary is quoted, such as per month or per year.

14. Choose the Schedule tab to enter information about normal working hours or probation period for the assignment.

15. Choose Correction or Update. Remember to choose Correction if you are correcting information that was created by default.

16. Save your work.

Entering Contingent Worker Information

To enter information about a new contingent worker, use the Enter Contingent Workers

template. When you enter a new contingent worker, the application automatically creates a default assignment for that contingent worker.

To enter a new contingent worker:

1. Complete the name and address fields.
2. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments:
    1. Select a purchase order for this assignment.
    2. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line.
    3. Information from the purchase order and purchase order line appears automatically in the Supplier Name, Supplier Site, Projected Assignment End, and Job fields.

    If you do not use Oracle Services Procurement, complete the supplier fields and the Projected Assignment End field.
3. Complete the work structures and working hours fields.
4. If you use Oracle Services Procurement, information from the purchase order line appears automatically in the Rate Basis, Rate Type, Currency, and Value fields. Otherwise:
    1. Select an Assignment Rate value. The rate basis and rate type values appear automatically. See Entering Assignment Rates for Contingent Worker Assignments, page 2-89
    2. Select a currency and enter a monetary value for the assignment rate.
5. Select Correction or Update.
6. Save your work.

Maintaining Contingent Worker Information

Use the Maintain Contingent Workers template.

To update contingent worker information:

1. Select the relevant contingent worker and choose the Show Details button.
2. Choose the Personal tab to enter or update the contingent worker's name.

3. Choose the Communication tab to enter or update home or work contact details.

4. Choose the Assignment tab to enter or update information about the worker's supplier, assignment, or work structures.

   Note: If you use Oracle Services Procurement to provide purchase order information, you cannot alter assignment or supplier information obtained from the purchase order or purchase order line. However, you can select a different purchase order or purchase order line.

5. Choose the Schedule tab to update the working hours information.

6. To end the placement, choose the End Placement button.

7. Select Correction or Update.

8. Save your work.

Activating an Assignment

You can activate an assignment using the Maintain Employee windows. For example, you may want to active an employee's assignment after an employee returns from maternity leave. The Active Assignment status means that the employee is working in accordance with his or her usual working conditions.

There are two methods you can use to activate an assignment.

To activate an assignment in the Summary window:

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to activate. Expand the node until the assignment you want to activate is displayed. Select the assignment.

2. Set the effective date to the date upon which you want to activate the assignment.

3. Choose the Actions button.

4. Select Activate Assignment and choose Next.

5. Select the assignment status you want to apply to the assignment and choose next.

6. Choose Finish to save your changes.

To activate an assignment in the Maintain window:

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to activate. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to activate the assignment.
3. Choose the Assignment tab and select the assignment you want to activate from the drop-down list.
4. Choose the Actions button.
5. Select Activate Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

Creating Additional Assignments

You can create additional assignments for an employee using the Maintain Employees windows.

To create an additional assignment:

1. In the Summary window, use the Data Organizer to select the employee for whom you want to create an additional assignment.

   Note: If you want to display the details of the employee you can choose the Show Details button to open the Maintain window.

2. Set the effective date to the date upon which you want to begin the assignment.
3. Choose the Actions button.
4. Select New Assignment and choose Next. A new assignment is created for the employee.
5. Choose Finish to save your changes.

   If you want to make the new assignment the primary assignment, see: Changing Primary Assignments, page 2-132

Suspending an Assignment

You can suspend an assignment using the Maintain Employee windows. For example, you may want to suspend an employee's assignment while they are on maternity leave

There are two methods you can use to suspend an assignment.

To suspend an assignment in the Summary window:

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to suspend. Expand the node until the assignment you want to suspend is displayed. Select the assignment
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Actions button.
4. Select Suspend Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

To suspend an assignment in the Maintain window:

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to suspend. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Assignment tab and select the assignment you want to suspend from the drop-down list.
4. Choose the Actions button.
5. Select Suspend Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

Terminate a Secondary Employee Assignment

You can terminate a secondary employee assignment using the Maintain Employee windows.

There are two methods you can use to terminate a secondary employee assignment.

To terminate a secondary employee assignment in the Summary window:

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to terminate. Expand the node until the assignment you want to terminate is displayed. Select the assignment.

   Note: You cannot terminate the primary assignment.

2. Set the effective date to the date upon which you want to terminate the assignment.
3. Choose the Actions button.
4. Select Terminate Secondary Employee Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

To terminate a secondary employee assignment in the Maintain window:

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to terminate. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to terminate the assignment.
3. Choose the Assignment tab and select the assignment you want to terminate from the drop-down list.
4. Choose the Actions button.
5. Select Terminate Secondary Employee Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

Ending a Secondary Employee Assignment

You can end a secondary employee assignment using the Maintain Employee windows.

There are two methods you can use to end a secondary assignment.

To end a secondary employee assignment in the Summary window:

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to end. Expand the node until the assignment you want to end is displayed. Select the assignment.
2. Set the effective date to the date upon which you want to end the assignment.
3. Choose the Actions button.
4. Select End Secondary Employee Assignment and choose Next.
5. Choose Finish to save your changes.

To end a secondary employee assignment in the Maintain window:

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to end. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to end the assignment.
3. Choose the Assignment tab and select the assignment you want to end from the drop-down list.
4. Choose the Actions button.
5. Select End Secondary Employee Assignment and choose Next.
6. Choose Finish to save your changes.

Checking for Duplicate People

If you enter a person in the Hiring Applicants or the Maintain Employee windows, with the same first and last name as a person who already exists on the system, a caution message will be displayed if you have the HR: Cross Business Groups profile option set to No. If you have specified a date of birth, the caution will only be displayed if another record with the same date of birth, or no date of birth exists. If you want to see more details about the existing records use the Find Duplicate button.

> **Note:** The caution message is displayed if there are any people with the same name throughout the system, however, the Find Duplicate button only enables you to access the details of people for whom you have security access.

If you have the HR: Cross Business Groups and HR: Cross BG Duplicate Person Check

profile options set to Yes, then a list of values is displayed showing the potential duplicates across business groups. You can either select one of the records shown to link the records together to show they are the same person, or cancel the save and use the Find Duplicates button to see more details if any of the records are in your business group.

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

To check for duplicate people:

1. Enter the new person or make any required changes in the Maintain window.

2. Choose the Find Duplicate button. The system now runs a query on all the people with the same first and last name, and date of birth if specified in the Maintain window, as the person you were editing, based on your security access, and displays the results in the Find window.

3. If you want to see details of any of the people retrieved in the query, select the record and choose the Details button. You will be prompted to save any changes that are pending.

   Note: If you select not to save the changes, you will lose any data entered for that person. If you are entering a new person it is recommended that you do not save the changes until you have investigated any possible duplications.

   The details of the person selected in the Find window are now displayed in the Maintain window.

   Note: If the Security check box is not checked on the Find window it is possible that you will see records that you are not permitted to retrieve, and hence will not be able to view in the Maintain window.

Sending a Workflow Notification

You can send an email notification to other people or job roles informing them of actions you have completed or actions they need to take. You use the Summary window of the Hiring Applicants form. The notification message is made up of details relating to the person and assignment and is usually completed as part of an action such as hiring a person.

To send a workflow notification:

1. Use the Find window to search for the person you are sending the notification about, or select them from the Record navigator in the summary window.

2. Choose the Notification button.

   If you select the person node and choose the Notification button, only tokens associated with the person will be used in the message such as Last_Name. If you select the assignment node, then tokens relating to the assignment details will also be used, such as Job.

3. In the Notification window, choose the message you want to send and the person or role you want to send it to. The messages are set up in Oracle Workflow Builder.

4. Choose Preview to view how the message will appear to the recipient.

5. Choose Send to send the notification message.

Entering Visa Related Data

You can enter a large amount of visa related information, such as passport information, and visit history, using the Maintain Visa windows.

To update employee information:

1. In the Summary window, use the Data Organizer to select the employee and choose Show Details.

2. Choose the Visa Administration tab to enter information relating to a person's visa into a number of extra information types. You can enter the following information:

   - Alien Income Forecast
   - Global Work Permit
   - Passport Details
   - Visa Details
   - Visa Payroll Details
   - Visa Residency Details
   - Visa Visit History

   See: Person Extra Information Types, page 2-17

3. Choose the Visa Checklist tab to enter scheduled and completed task information relating to visa holders within your enterprise.

4. Choose the Address button to add further addresses, such as the employee's primary home country address.

   See: Entering Addresses, page 2-184

5. Choose the Contact button to enter details of the person's next of kin and other contacts.

   See: Entering Next of Kin and Other Contacts, page 2-189

6. Choose the Notify button to send notification of the visa's expiry to the employee and supervisor.

7. Save your work.

Saving Search Criteria or Search Results to a Folder

When you enter a query in the people management Find window, you can save the query or its results to a folder. The system adds the folder to the Data Organizer on the Summary window. The next time you use the Summary window, you can open the folder to work with the saved list of people (if you saved the query results) or perform the query again (if you saved the query). For more information about the types of folder, see: Folders For Saved Search Criteria or Results, page 2-198.

Perform your find using the Find window before following these steps.

To save a query to a Search Criteria folder:

1. Choose the Save As button.

   The Save As window is displayed.

2. Make sure Search Criteria is selected.

3. Select a folder in which to create the new folder.

4. Enter a unique name for the folder.

5. Select Public if you want the folder displayed in the Public folders list for other users to see. A folder is also created in your Personal Folders list.

6. Choose Save.

   You can see the folder in the Data Organizer when you view the Summary window. Expand Private Folders to see your new folder.

Note: If you cannot see your folder on the Summary window, right-click on the Data Organizer and choose Refresh.

To save the results of a query to a Group folder:

1. In the results list, select the people you want to add to your folder.
2. Choose the Save As button.

   The Save As window is displayed.
3. Make sure Only Selected Results is selected.
4. Select a folder in which to create the new folder.
5. Enter a unique name for the folder.
6. Choose Save.

   You can copy people from other folders into Group folders in the Data Organizer. See: Managing Your Group Folders, page 2-200.

Deleting a Folder

You can delete Search Criteria and Group folders from the Data Organizer on the Summary window if you no longer need to use them. You cannot delete Public folders.

To remove a folder from the Data Organizer:

1. Expand Personal Folders and select the folder. to be deleted.
2. Choose Delete from the Edit menu. You can also right-click and choose Delete from the right mouse menu.

   A folder does not have to be empty before you can delete it.
3. Save your work.

Creating a New Group Folder

You can create a new group folder or subfolder on the Data Organizer of the Summary window. Then you can add people to your new folder by cutting (or copying) and pasting from other folders. See: Managing Your Group Folders, page 2-200.

Note: Using the Data Organizer, you can only create new folders in the

Personal Folders branch. Use the Find window to create Public folders.

To create a new folder on the Data Organizer:

1. Select Personal Folders.
2. Select a folder in which to create the new folder.
3. Right-click and choose New Folder.
4. Enter a name for your folder in the New Folder window.
5. Choose OK.
6. Save your work.

Reporting on the Workforce

The Workforce Headcount Report Set

The workforce headcount report set includes the Workforce Count Report, the Workforce Count Report (Spread Sheet Version) and the Head Count Detail Report. The reports display headcount information for your organization on a local or world-wide basis for the search parameters you specify.

The Workforce Count Reports

Both of the workforce count reports enable you to access simple workforce information for all organizations within an organization hierarchy and date range you specify. The difference between the workforce count reports is that the Workforce Count Report (Spread Sheet Version) enables you to open the report in a spreadsheet format. The reports display a breakdown of the information using the following headers:

- Organization
- Rev/Non-Rev
- Start (Total)
- End (Total)
- Net Change
- Hires
- Terminations
- Other (Net)

> **Important:** The dates you specify must fall within one version of the Organization Hierarchy on which you are reporting.

The reports display a count of defined worker types, including all types of contingent and temporary workers. The reports also display transition information, for example the number of new hires and terminations.

The reports return a headcount value for the assignment ID based on either the assignment budget value, or the supplied TEMPLATE_HEAD FastFormula. You can create custom FastFormulas on which to return the headcount values by creating a FastFormula named BUDGET_HEAD. For more information, see Running the Workforce Count Reports, page 2-226

The Head Count Detail Report

The Head Count Detail Report enables you to display detailed headcount information for an organization hierarchy. The report displays a breakdown of the information using the following headers:

- Organization
- Division
- Rev/Non-Rev
- Beginning Head Count
- Regular
- Contract
- Temp
- New Hires
- Offers
- Vacant FTE
- Termination
- Ending Headcount
- # Change
- % Change
- Attrition Rates

Three FastFormulas are supplied with the Head Count Detail Report, that are used to control the output of the report. These are:

- HR_PERSON_TYPE_TEMPLATE which maps person types and employment categories to worker types regular, temporary and contract.
- HR_MOVE_TYPE_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for employees.
- HR_CWK_MOVE_TYPE_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for contingent workers.

If your enterprise has different requirements to those defined in the supplied formulas, then you can create your own FastFormulas to accurately represent the setup of your enterprise. You can define worker type mappings to person type and employment category by creating a FastFormula named HR_PERSON_TYPE. Similarly, you can create your own FastFormula to define leaving reasons by creating a FastFormula named HR_MOVE_TYPE for your employees and HR_CWK_MOVE_TYPE for your contingent workers. If you define a formula with one of these names, then it overrides the corresponding supplied formula when you run the report. For more information, see: Running the Head Count Detail Report, page 2-224

Running the Full Personal Details Report Set

To create printed reports of the personal information held for one person, you can run the Full Personal Details report set. It comprises four reports that meet employees' rights to view their own personal details under data protection legislation:

- Full Person Details 1 reports on addresses and information entered in the People window, such as name, date of birth, nationality, and work telephone number.
- Full Person Details 2 reports on applications and applicant interviews.
- Full Person Details 3 reports on assignment information including periods of service, payment methods, and element entries.
- Full Person Details 4 reports on miscellaneous work information, including special information, absences, recruitment activities, and contacts.

If you do not need to see all this information for the employee, you can run individual reports rather than the report set. The Full Person Details report, Full Assignment Details report, and Full Work Details report are equivalent to reports 1, 3, and 4 in the report set, respectively. The Full Applicant Details report is equivalent to report 2 in the report set, but you can only run this as a separate report for an applicant, not an employee.

You run report sets from the Submit Request Set window.

To run the Full Personal Details report set:

1. In the Request Set field, select Full Personal Details.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the reports.
4. Enter the name of the person for whom you want to print the reports.
5. Choose the Submit Request button.

Running the Employee Summary Report

This report is a current summary of information for an employee, covering addresses, contacts, period of service, assignments, special information, personal payment methods, and element entries.

Run reports from the Submit Requests window.

To run the Employee Summary Report:

1. In the Name field, select Employee Summary.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Enter the name of the employee whose summary you want to see.
5. Choose the Submit button.

Running the Employee Payroll Movements Report

The Employee Payroll Movements Report shows employee assignment changes for a particular payroll and pay period. Employee assignment changes include new hires, terminations, transfers in, and transfers out. You can use this information to monitor employee assignment changes for turnover analysis.

You run the Employee Payroll Movements Report from the Submit Requests window.

To run the Employee Payroll Movements Report:

1. In the Name field, select Employee Payroll Movements Report.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Select the payroll and pay period for which you want to see the information.
4. In the Employee Detail field, select:
   - Summary Only, to see only the totals for each category of change
   - Assignment Number, to see a list of new hires, terminations, transfers in, and transfers out in order of assignment number
   - Employee Name, to see a list of new hires, terminations, transfers in, and

transfers out in order of employee name

5. Choose Submit.

Running the Worker Organization Movements Report

The Worker Organization Movements Report shows worker movements into and out of a particular organization or organization hierarchy. Worker movements include new starters, terminations, transfers in, and transfers out for employees, contingent workers, or both.

Run the Worker Organization Movements Report from the Submit Requests window.

To run the Worker Organization Movements Report:

1. In the Name field, select Worker Organization Movements Report.

2. If the Parameters window does not open automatically, click in the Parameters field.

3. Specify the organization as follows:

   - To see information for a whole organization hierarchy, select its name and version in the Organization Structure and Version fields. Leave the Parent Organization field blank.

   - To see information for one organization, select its name in the Parent Organization field. Leave the Organization Structure and Version fields blank.

   - To see information for an organization and its subordinates in a particular hierarchy, select the name of the organization in the Parent Organization field, and the name and version of the organization hierarchy to which it belongs in the Organization Structure and Version fields.

4. Specify the period for which you want to see the information.

5. In the Worker Type field, specify whether the report should include employees, contingent workers, or both.

6. In the Worker Detail field, select:

   - Summary Only, to see only the totals for each type of movement

   - Assignment Number, to see a list of worker movements in order of assignment number

   - Worker Name, to see a list of worker movements in order of worker name

7. Choose the Submit button.

Running the Assignment Status Report

This report lists people assigned to particular organizations, jobs, positions and grades, with specific assignment statuses. If you select both applicants and employees as person types, the report prints out in two sections. Otherwise it prints for the type you select.

Run reports from the Submit Requests window.

To run the Assignment Status Report:

1. In the Name field, select Assignment Status Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Leave the Organization Structure field blank to see information about all organizations. Select an organization hierarchy name to see assignment statuses in a number of subordinate organizations.
5. If there are multiple versions, select a version.

   If the effective date lies between the version's start and end dates, the report is effective as of this date. If it lies outside these dates, the report is effective as of the start date of the version you select.
6. Leave the Parent Organization field blank to see information about all organizations. Select a name in this field to see information on all subordinate organizations in the hierarchy.

   Note: You must enter a value in this field if you have entered a value in the Organization Structure field, and you must leave this field blank if you left that field blank.
7. Make entries in the Group, Job, Position, Grade and Payroll fields as required.

   If you leave all segments of the Group flexfield blank, you see information about employees in any groups. If you leave one segment blank you see employees with any value for that segment.
8. Enter Yes in the Primary field if you want to report on primary assignments only. Leave blank to include all assignments.
9. Select Employee, Applicant or Both in the Person Type field. This determines which

sections of the report are printed.

10. Select up to four assignment statuses, or leave blank to list employees and/or applicants with any assignment status.

11. Choose the Submit button.

Running the Terminations Report

This report shows the reasons why workers left your organization within a specified period.

There are two Totals columns included in the Terminations report. The Total column represents the aggregate of individual Total columns whereas the All Termination column represents all the employees who have been terminated between the Date From and Date To parameters specified while generating the report.

You run reports from the Submit Requests window.

To run the Terminations Report:

1. In the Name field, select Terminations Report.

   The Parameters window opens.

2. Enter the effective date for which you want to see the report.

3. If you want to see terminations for a complete or partial organization hierarchy, select the hierarchy name and version.

4. In the Parent Organization field, select the parent organization within the selected organization hierarchy whose subordinate organizations you want to include in the report.

   If you have not selected an organization hierarchy, enter in the Parent Organization field the name of the single organization for which you want to generate the report. In this case, as you have not selected an organization hierarchy, the report applies to the specified organization only; terminations in subordinate organizations do not appear in the report.

5. Enter the start and end dates of the period in which you are interested.

6. Select at least one termination reason to include in the report.

7. Click Submit.

Running the Conclude Placement Report

The Conclude Placement Report shows, for a specified period and termination reason, the number of terminated contingent-worker placements in an organization.

Run the Conclude Placement Report from the Submit Request window.

To run the Conclude Placement Report:

1. In the Name field, select Conclude Placement Report.

   The Parameters window opens.

2. To include placement-termination data for multiple organizations in an organization hierarchy, select the hierarchy name in the Organization Structure field.

3. In the Parent Organization field, select the organization, within the specified organization hierarchy, whose subordinate organizations you want to include in the report. If you have not selected an organization hierarchy, enter the name of the single organization you want to include in the report in the Parent Organization field.

4. Enter the start and end dates of the period in which you are interested.

5. Select at least one termination reason.

6. Click Submit.

Running the Head Count Detail Report

You run the Head Count Detail Report from the Submit Request window.

If the dates you enter in the Date From and Date To fields fall within one version of the organization hierarchy you define, only one page of results is returned. If, for example, the dates span more than one version of the organization hierarchy, one page of results will be returned for each version.

To run the Head Count Detail Report:

1. In the Name field, select Head Count Detail Report.

2. Enter the Parameters field to open the Parameters window.

3. Set the date from which the report begins the search.

4. Set the date up until which the report searches.

5. Select the organization hierarchy on which you want to report.

6. Enter the top organization.

7. Select the type of worker which you want to report. For example, you can choose to report on employees, contingent workers, or both.

8. Select the roll up. If yes, all organization values will be rolled up to the parent organization.

9. Select the budget type for the report.

10. Select Yes, if you want to include the top organization entered at step 6.

    If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.

11. Select the assignment type to include in the report.

12. Enter the reporting period in the Days Prior to End Date field. The number of days you enter determines how many days the report covers, prior to the end date of the organization hierarchy version you specify in step 4.

13. Choose the OK button.

14. Choose the Submit button to run the report.

    The report displays the results for the criteria you entered.

    - Organization: The top organization in the selected hierarchy.
    - Division: The name of the organization below the top organization.
    - Rev/Non-Rev: Indicates the headcount details in the Revenue or Non-Revenue headings. The application uses the value entered in the Job Category segment in the Job Extra Information Type to display the headcount details in Rev/Non-Rev
    - Beginning Head Count: The total headcount from the date entered in the Date From parameter.
    - Permanent: Employee person type with the Full Time Regular or the Part Time Regular employment category status.
    - Contract: The system person type of Contract
    - Fixed Term: Indicates the temporary headcount. The report uses the HR_PERSON_TYPE_TEMPLATE formula to calculate worker type. If a worker is not assigned an Assignment Category or a value other than Fill-Time Regular

in the Assignment window, then the Headcount Details report displays the worker in the Fixed Term count.

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

- New Hires: The new hires count within the last x days as entered in the report parameter
- Transfers In: The number of employees or workers who have moved into the selected organization hierarchy.
- Transfers Out: The number of employees or workers who have moved out of the selected organization hierarchy.
- Numbers of open and accepted offers
- Vacant FTE: Number of vacant FTE for each open requisition within the division.
- Number of voluntary and involuntary terminations
- Ending Headcount: Total headcount on the date entered in the Date To parameter.
- Change: The difference between the beginning headcount and the ending headcount.
- % Change: The percentage change in the headcount over the reporting period, calculated as: (Beginning Head Count - Ending Head Count) / Beginning Headcount
- Attrition Rate: The total headcount of employees or workers who have separated from the selected organization during the reporting period, calculated as: (Sum of Terminations/ Sum of Beginning Headcount) * 100.

Running the Workforce Count Reports

You run the Workforce Count Report and the Workforce Count Report (Spread Sheet Version) from the Submit Request window.

To run the workforce count reports:

1. In the Name field, select either the Workforce Count Report or the Workforce Count Report (Spread Sheet Version). Choose the spreadsheet version if you want to open the report in a spreadsheet format.

2. Enter the Parameters field to open the Parameters window.

3. Set the date from which the report begins to search.

4. Set the date until which the report searches.

   Note: The Start Date and End Date you specify must fall within one version of the organization hierarchy on which you want to report.

5. Select the organization hierarchy on which you want to report.

6. Enter the top organization.

7. Select the roll up. If yes, all organization values will be rolled up to the parent organization.

8. Select the budget type for the report.

9. Select yes, if you want to include the top organization entered at step 6.

   If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.

10. Select the assignment type to include in the report.

11. Choose the OK button.

12. Choose the Submit button to run the report.

    The reports display headcount information for the parent organization and all the organizations below it in the organization hierarchy. You can choose to run the Workforce Count Report for an entire hierarchy, or from a selected parent organization within the hierarchy.

Running the Duplicate Person Report

If you are upgrading from a release prior to the PER G Minipack, then, as part of your upgrade to support the global person functionality, an entry for every person record in HRMS is made in the TCA.

See: The Person Record, page 2-7 for more information on how the HRMS and TCA schemas link together.

If your enterprise has multiple business groups and you have international employees, then you may find that, after this upgrade, you have multiple TCA party records for the same person. For example, this may occur if a person has transferred from one business group to another.

To identify potential duplicate records, you run the Duplicate Person report in the Submit Requests window.

To run the Duplicate Person report:

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

Running the Full Person Details Report

The Full Person Details Report provides you with accurate information about an employee's history. The report features all periods of service and changes in employment history. Employee's can request the report on an ad-hoc basis.

Run reports from the Submit Request window.

To run the Full Person Details Report:

1. In the Name field, select Full Person Details Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter an effective date.
4. Select the employee to be reported on.
5. Choose the Submit button.

Running the Person Full History Report

Use this report to see the personal and professional details of employees and contingent workers in your enterprise. You can include an employee's applicant history and details about the current assignment such as absence, contact, and salary information in the report. You can also see the details of multiple assignments, if any, for the employee or contingent worker.

This report highlights any information that has changed over a period of time. If your

enterprise uses element sets to group together similar elements, then you can select to include only those elements from a particular set.

For contingent workers, you can see supplier details such as supplier site, purchase order number, and purchase order line, details about the periods of placement and assignment rates. You cannot view the absence and termination details for contingent workers.

Run the Person Full History Report from the Submit Request window.

To run the Person Full History Report:

1. In the Name field, select the Person Full History Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the person for whom you want to see the details.
4. Select Yes to include the details held in descriptive and key flexfields attached to a person, such as job, position, and assignment. If the flexfield structure is not defined or contains no values, you do not see these details in the report.
5. Select the element set to restrict the information to a specific group of elements. If you do not select any element set, all elements present in the employee's element entries are listed. For example, if the compensation element set includes details about salary, bonus, and stock options, you can view these details for the employee
6. Select Yes in the appropriate fields to include the following details:
   - Employee's applicant record for the current assignment
   - Employee's assignments, absences, and terminations, and contingent worker's assignments
   - Employee's salary and contingent worker's assignment rates
   - Contacts, addresses and phone numbers for employees and contingent workers
   - Employee's ethnic origin, nationality, and disability status

   Otherwise select No. If you enter No, or if there are no records for that parameter, you do not see the individual records in the report.
7. Choose the Submit button.

Using the People Folders

Using the People Folder window, you can enter inquiries about the people held on Oracle HRMS. You select the fields of personal information you want to see, and

position them in the order you prefer. For example, you can produce an alphabetical listing of all applicants and their gender, nationality, and disability registration.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

> **Note:** The system administrator can create configured versions of the People Folder window so that you use each version for one person type only.

To produce lists of assignments:

1. Enter and run a query in the folder. For example, you could run the query "C%" in the Full Name field to view all people whose names begin with C.

2. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

   For further information about Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Listing Assignments Using the Assignments Folder

Using the Assignments Folder window, you can query lists of current assignments, past assignments, or both. You select the fields of assignment information you want to see, and position them in the order you prefer. For example, you can produce a listing of all current employees ordered by organization, and by grade within organization.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

> **Note:** The system administrator can create customized versions of the Assignments Folder window so that you use each version for one person type only.
>
> The system administrator can also link this window in a task flow so that you use it to access other windows of employment information. Notice that if you select a past assignment in the folder, you cannot open other windows of employment information.

To produce lists of assignments using the assignment folder:

1. Select whether you want to view current assignments, past assignments or both.

2. Run the query.

   The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

3. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.

4. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

   For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Listing Assignments Using the List Assignments Window

In this window, you can view *current* employees and applicants. To view former employees or applicants (or both current and former), see: Using the List People By Assignments Window, page 2-231

To produce lists of assignments:

1. Select values in one or more fields in the top part of the window, and choose the Find button.

   If you enter the Job, Position, Grade, or Group fields, a window opens prompting you for individual segments of the flexfield. You can enter selection criteria in one or more segments. This means that you can search on *parts* of the job name, for example.

   The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.

3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

   For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Using the List People by Assignment Window

In this window you can choose whether to view current or former employees, applicants, or contingent workers. However, you must search on a whole Job, Position,

or Grade name, not on segments of these flexfields. To search on segments of the flexfields, use the List Assignments window, see: Listing Assignments Using the List Assignments Window, page 2-231

To produce lists of assignments:

1. Select values in one or more fields in the top part of the window, and choose the Find button.

   The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.

3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

   For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Listing Workforce by Position

There are two windows for viewing lists of workers by position:

- List Workforce by Position
- List Workforce by Position Hierarchy

List Workforce by Position Window

To view workers in a single position, or in all positions corresponding to a job or organization, use the List Workforce by Position window.

To view worker names by position:

1. Select any combination of an organization, job, or position.

2. Choose the Find button.

   The folder displays the positions that match your selection criteria, together with the holder's name employee, or contingent worker number and worker type. The worker type is similar to the person type, except that the worker type only displays the person's active worker type. For example, the person type of *Employee.ex-applicant* displays as *Employee*.

   If there is more than one holder for a position, the number of holders is displayed in

the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

> **Note:** You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

List Workforce by Position Hierarchy Window

To view lists of workers in a number of positions within a hierarchy, use the List Workforce by Position Hierarchy window.

To view lists of positions within a position hierarchy:

1. Select a position hierarchy and the highest position in the hierarchy for which you want to list workers.

2. Choose the Find button.

   The folder displays all positions below the one you selected in the hierarchy. It also lists the employees and contingent workers who hold these positions as well as their worker type. The worker type is similar to the person type, except the worker type only displays the person's active worker type. For example, the person type of *Employeee.ex-applicant* displays as *Employee*.

   If there is more than one holder for a position, the number of holders appears in the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

   > **Note:** You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

   For further information about Folders see: Customizing the Presentation of Data , *Oracle E-Business Suite User's Guide*

Listing Workforce by Organization

In the List Workforce by Organization window, you can view lists of employees within one organization or within all organizations below a specified level in a hierarchy you select.

To list workers in several organizations:

1. Select an organization hierarchy and select the highest organization in this hierarchy for which you want to list workers. Choose the Find button.

To list workers in one organization only:

1. Leave the Organization Hierarchy field blank and select an organization. Choose the Find button.

   You can enter a query in the Workforce block to further restrict the list of employees to be displayed.

   Manager Field

   The Manager field identifies any worker for whom the Manager check box is checked in the Miscellaneous region of the Assignment window.

   If there is more than one manager in the organization you select, the Manager field displays the number of managers. You can view the names of these managers by choosing the List icon from the Toolbar.

   Type Field

   The Type field displays the person type related to the worker identified in the Name field.

   Organization Field

   If a worker belongs to more than one organization within the hierarchy you selected, the number of organizations appears in the Organization field. You can view the names of these organizations by choosing the List icon from the Toolbar.

Listing People by Special Information

To view a list of people who match a particular profile for one Special Information Type, use the List People By Special Information window.

> **Note:** The system administrator can create configured versions of the List People By Special Information window so that you use each version for one information type only. For example, one version could be called List People By Technical Skills.

To list people by special information:

1. Select a Special Information Type.

2. Click in the Details field. A window opens prompting you for the details you have defined for this information type.

3. Enter values in the fields against which you want to match people, then choose OK. If you leave a field blank, it is not used in the matching process.

4. Choose the Find button.

   Employees and applicants who match your selection criteria are listed in the folder in the lower part of the window. You can enter a query here to further restrict the list of people. If you have access to the Folder menu you can remove, rearrange, or resize the fields displayed.

   For more information about using folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Viewing a Worker's Assignment History

Use the Assignment History window to view information about a worker's assignments in both current and previous periods of service and placements. If a worker has been both an employee and a contingent worker, both types of assignment appear in the assignment history.

To view a worker's assignment history:

1. In the Find Person window, select or enter the worker's full name or number. If you select the worker's name or number from a list, you can limit the list size by selecting a value in the Current field:

   - Yes includes only current workers.
   - No includes only ex-workers.
   - All includes both current and ex-workers.

2. Choose the Find button.

   In the Assignment History window:

   - This Period shows complete years and months in the current period of service or placement.
   - All Periods shows complete years and months in all periods of service and placements.
   - Including Breaks shows total elapsed years and months since the worker's initial hire or placement start date.

   By default, Assignment History displays one row of information about each assignment in the current period of service or placement.

3. To display assignments from previous periods of service or placements, click in the Work History Start Date or End Date field and press the Down Arrow key. As the dates for previous periods of service or placements appear, related assignments

appear in the Assignment History box. Use the Up Arrow key to reverse the display.

Workforce Intelligence Key Concepts for People Management

Key Concepts for People Management Intelligence

The following concepts enable you to accurately interpret the results of the People Management intelligence reports:

- Workforce Count, page 2-237
- Workforce Gains and Losses, page 2-237
- Enterprise Selection, page 2-238
- Job Categories , page 2-239

Workforce Count

One of the most powerful features of the People Management reports is that you can define how workforce is counted.

Workforce does not necessarily have to be a count of the number of people in your enterprise; it can instead be a count of the assignments and any budget measurement type you have set up. For example, you can count workforce using the budget measurement types of FTE or Headcount.

Additionally, by writing your own formula, using Oracle FastFormula, or the provided formula, you can instruct the report to count workforce exactly how you want to.

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

Workforce Gains and Losses

To enable you to investigate the workforce in your enterprise, the reports calculate gains and losses as follows:

- **Gains** are the total workforce that exists in the organization or organizations at the end of a time period, which did not exist at the beginning of the time period.
- **Losses** are the total workforce that exists in an organization or organizations at the beginning of a period, but no longer exists at the end of the period.
- **Total Workforce** is the workforce at the end of the time period.

Note: Workforce is counted using active and suspended assignments.

Enterprise Selection

You can decide which area of your enterprise to report on using the parameters of the reports. There are two different methods of enterprise selection:

- Rollup Organizations
- Rollup Each Organization

Rollup Organizations

Use the Organization or Top Organization and Hierarchy parameters, together with the Organization Rollup parameter to report on one organization, an organization hierarchy, or a section of an organization hierarchy.

To report on a hierarchy, or a section of a hierarchy, enter the top organization or hierarchy you want to report on in the report parameters. You can then decide whether or not you want to rollup all the subordinate organizations in the hierarchy by entering either Yes or No in the Rollup Organizations parameter.

In some reports you can leave the Organization parameter blank to include all organizations in the hierarchy.

Rollup Each Organization

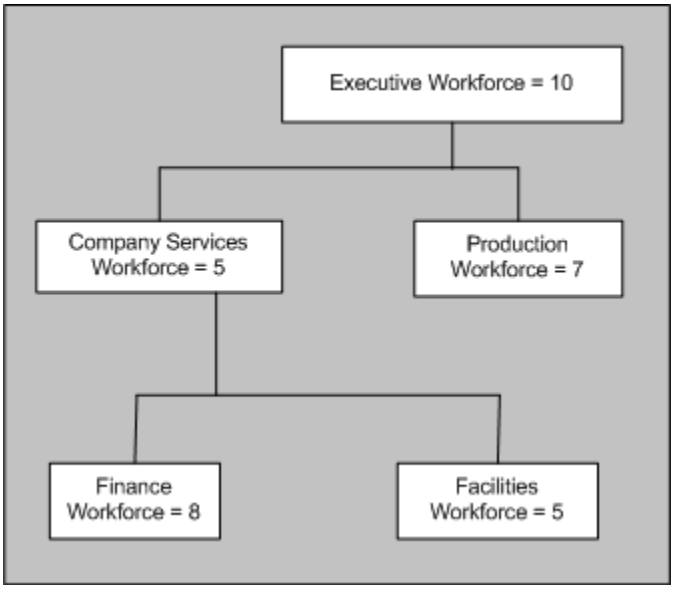
Select the area of your enterprise in the reports by selecting a section of an organization hierarchy. For each report, you only need to enter one organization; all its subordinate organizations are included in the report.

You can then decide to either display information about each organization separately, or rollup information at each level of the hierarchy.

For example, consider the hierarchy for Global Industries shown in the diagram below. To select this section of the hierarchy, you enter Executive in the Organization parameter. The report automatically includes the Company Service, Production, Finance, and Facilities subsidiary organizations.

If you decide not to rollup the workforce count, the report displays each organization independently, and shows the workforce total for only that organization. The workforce total for each organization would be the same as shown in the diagram below. It shows the Executive Workforce of 10 at the top of the organization. Reporting to the Executive Workforce are the Production Workforce of 7, and the Company Services Workforce of 5. Reporting to the Company Services Workforce are the Financial Workforce of 8, and the Facilities Workforce of 5

Global Industries Hierarchy



If you decide to rollup each organization, the report will display information that is calculated for that organization and all the organizations below it in the hierarchy.

For Global Industries, the Workforce figures would be shown as in the following table:

Organization	Rolled Up Workforce
Executive (Top Organization)	35
Company Services	18
Finance	8
Facilities	5
Production	7

Job Categories

The Workforce Summary Analysis, Workforce Ratio, and Workforce Comparison HRMSi reports use job categories to investigate Workforce within your enterprise.

> **Note:** You can also analyze how successfully you are recruiting for each job category using the Recruiting and Hiring HRMSi reports.

Oracle HRMS enables you to set up job categories for the different jobs within your enterprise. You can set up categories to classify all your jobs. So you could, for example, set up the job categories of technical, managerial, administration, and so on.

Jobs within your enterprise can fall into more than one category, and HRMS enables you to enter as many categories as you need for a job.

Use the Workforce Ratio report to analyze the percentage of workforce your enterprise has in different job categories. Use the Workforce Comparison report to analyze the absolute levels of workforce.

Both the Workforce Ratio, and the Workforce Comparison reports use assignments to calculate the workforce for each job category. For an assignment to be included it must:

- Be active or suspended.
- Have the job and job category selected.
- Fit the selection criteria entered.

  For example: if you report on salaries by grade, the assignment must be for that grade.

If a job category does not have any workforce associated with it, the reports show it as a zero on the table, but do not display it in the bar chart.

Jobs may be assigned to more than one category. For example the job of Software Manager could have the job categories of technical and managerial. If you choose to report on both these categories, reports will display all assignments with the job of Software Manager in both the managerial and technical job categories.

For information on associating jobs with specific job categories, see Defining A Job, *Oracle HRMS Enterprise and Workforce Management Guide*

Workforce Intelligence for People Management

Employee Anniversary and Birthday Detail Workbook

This workbook enables you to report on employee anniversaries and birthdays by organization and supervisor hierarchy.

Worksheets

This workbook has the following worksheets

- Organization Hierarchy
- Supervisor Hierarchy

Headings and Calculations

The worksheets use the following calculations:

- **Current Service Decimal**

  Calculates the employee's length of service in their latest assignment as a number of years.

- **Total Service Decimal**

  Calculates the employee's length of service since their first assignment as a number of years.

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by organization. Total and current service calculations are in respect of the system date. The workbook uses the current version of the organization hierarchy.

Business Questions

When is the anniversary date of employment of my employees in a given organization hierarchy?

When are my employees' birthdays?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by supervisor. Total and current service calculations are in respect of the system date. The workbook uses the current version of the supervisor hierarchy.

Business Questions

When is the anniversary date of employment of my employees in a given supervisor hierarchy?

When are my employees' birthdays?

Parameters

You must specify values for the following parameters:

- Supervisor

Employee by Supervisor Status Workbook

This workbook enables you to report on the supervisor hierarchy and salary details for your employees.

Key Concepts

See the following topics to accurately interpret this workbook:

Workforce Count, page 2-237

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees, by organization.

The worksheet includes employees who have an assignment on the effective date within the selected organization hierarchy.

Business Questions

Who supervises my employees in a given organization?

How many direct reports do my employees in a given organization have and what are the total salaries of those direct reports?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees by supervisor.

The worksheet includes employees who have an assignment on the effective date, and report directly to the selected supervisor.

Business Questions

Who supervises my employees?

How many direct reports do my employees have and what are the total salaries of those direct reports?

Parameters

You must specify values for the following parameters:

- Supervisor
- Effective Date

Employee Composition Analysis Workbook

The Workforce Composition Analysis workbook investigates employee composition by assignment details, salary band, and time service band.

It enables you to:

- Compare employee assignment details across organizations.
- Analyze salary information across organizations.
- Change salary groupings.
- Report on salary and time in service bands.

Workbooks

This workbook has the following worksheets:

- By Assignment Details
- By Salary Band
- By Time In Service Band

By Assignment Details Worksheet

This worksheet enables you to analyze employee assignment details by organization, job, position, or grade.

Business Questions

What is the composition of my workforce by assignment?

Parameters

This worksheet has no parameters.

By Salary Band Worksheet

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

Business Questions

What is the composition of my employees by salary band?

Parameters

This worksheet has no parameters.

By Time In Service Band Worksheet

This worksheet enables you to analyze the distribution of employees within an

organization by length of service.

Business Questions

What is the composition of my employees by service band?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculations:

- **Service Band**

  Populates the Service Band page item in the worksheet. This calculation creates the service bands.

Employee Hired or Terminated Detail Workbook

This workbook enables you to report on employees who terminated or were hired within two specified dates.

Basic employee primary assignment details are shown, including:

- Hire date
- Termination date
- Termination reason where applicable

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees who terminated or were hired within two specified dates for a given organization and its subordinate organizations.

Business Questions

Provide me with a list of employees who have been hired into or who have separated from a given organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

Related Topics

Workforce Count, page 2-237

Employee Mailing Address Detail Workbook

This workbook enables you to report on employee current primary addresses in a non-legislative specific address format.

This is useful for global reporting of employee addresses.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee current primary addresses in a non-legislative specific address format, for a given organization and its subordinate organizations.

Business Questions

Show me the primary addresses for all employees within a specific organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee current primary addresses in a non-legislative specific address format, for a given supervisor and their subordinates.

Business Questions

Show me the primary address of each employee reporting directly or indirectly to a specific supervisor.

Parameters

You must specify values for the following parameters:

- Supervisor

Employee Organization Transfer Detail Workbook

This workbook enables you to report on employee primary assignment organization transfers during a given period. The workbook output includes the employee primary assignment details before and after the transfer, including:

- Job Name
- Organization Name
- Supervisor Name

The workbook also shows the movement type (Organization Movement within Hierarchy, Organization Movement out of Hierarchy, Organization Movement into Hierarchy) for each employee transfer.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given organization and its subordinate organizations.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

Business Questions

Who has transferred into or out of my organization hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

Supervisor Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given supervisor and their subordinates.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

Business Questions

Who has transferred into or out of my supervisor hierarchy?

Parameters

You must specify values for the following parameters:

- Supervisor
- Start Date
- End Date

Employee Primary Assignment Detail Workbook

This workbook enables you to report on basic employee details by employee primary assignment.

The workbook output is grouped by location. Employee primary assignment count totals are shown for each location

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

Business Questions

Show me the primary assignment details for each employee within a specific organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Location

Supervisor Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

The Supervisor Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for a given supervisor and their subordinates.

Business Questions

Show me the primary assignment details for each employee reporting directly or indirectly to a specific supervisor.

Parameters

You must specify values for the following parameters:

- Supervisor
- Effective Date
- Location

Employee Termination Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook displays details of all terminated employees, including their basic primary assignment details at the time of termination, including:

- Employee Name
- Employee Number
- Organization
- Job
- Grade
- Position
- Location
- Supervisor
- Working Hours
- Termination date
- Termination reason

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

Business Questions

Who has separated from my organization hierarchy and why?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date
- Budget Measurement Type

Related Topics

Workforce Count, page 2-237

Employee Termination with Comments Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook only displays terminated employees who have a salary. The workbook shows the primary assignment details at the time of employee termination, including:

- Employee Name
- Employee Number
- Organization
- Job
- Grade
- Position

- Location
- Supervisor
- Working Hours
- Salary
- Termination date
- Termination comments
- Termination reason

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

Business Questions

Who has separated from my organization hierarchy and why?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date
- Budget Measurement Type

Related Topics

Workforce Count, page 2-237

Human Resource Setup Analysis Workbook

This workbook investigates specific information about your Human Resources system. The workbook enables you to:

- Analyze trends in terminations by ethnic origin
- View basic employee information
- Analyze temporary employee information
- View employee assignment information
- Report on organization hierarchy

Worksheets

This workbook has the following worksheets:

- Terminations with EEO
- Anniversary Birthdays
- HR Temp List with Tenure
- Employee Home Address
- Employee Job History
- Assignments by Organization
- Assignments by Organization Rollout

Terminations with EEO Worksheet

This worksheet enables you to analyze terminations with ethnic origin over a specific time period.

Business Questions

Why are employees separating?

Parameters

You must specify values for the following parameters:

- Termination Budget Measurement Type

- Termination Date Lower
- Termination Date Upper

Anniversary Birthdays Worksheet

This worksheet enables you to view birthdays and start dates of current employees. The worksheet also enables you to view other employee information, for example, length of service, employee number, and supervisor name.

Business Questions

When are the birthdays and anniversaries of my employees?

Parameters

This worksheet has no parameters.

HR Temp List with Tenure Worksheet

This worksheet enables you to analyze deployment factors associated with positions, people in specific positions, and position applicants.

Business Questions

How are my employees deployed throughout my organization?

Parameters

This worksheet has no parameters.

Employee Home Address Worksheet

This worksheet enables you to view the primary addresses of employees.

Business Questions

What are my employees' addresses?

Parameters

You must specify values for the following parameters:

- Person Name LIKE

  To restrict the size of the list returned, you can enter part of the employee's name, preceded and followed by the % wildcard.

Employee Job History Worksheet

This worksheet enables you to view employee job history across your organization.

Business Questions

When were my employees assigned to a particular job?

Parameters

You must specify values for the following parameters:

- Job Name

Assignments by Organization Worksheet

This worksheet enables you to report on the assignments within your organizations.

Business Questions

How many assignments are present in each organization?

Parameters

This worksheet has no parameters.

Assignments by Organization Rollup Worksheet

This worksheet enables you emulate the rollup flexibility of HRMSi reports by using an organization hierarchy to control the information displayed.

Business Questions

How many assignments are present in each organization?

Parameters

This worksheet has no parameters.

Person/Assignment History Detail Workbook

This workbook enables you to track applicants, monitor workers' assignment history, and analyze termination history.

For a person's assignment history, you can analyze the following:

- Workforce movement within the organization

- Time between recruitment stages
- Trends via termination reasons

Worksheets

This workbook has the following worksheets:

- Person Assignment
- Application
- Employee Separation

Person Assignment Worksheet

This worksheet enables you to analyze a person's assignment history between specific dates. For each person you can examine:

- The current assignment
- Details of previous assignments

Business Questions

What has an employee been assigned to?

Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

Application Worksheet

This worksheet enables you to analyze an applicant's assignment record between the start and end of an application.

For each employee you can examine the following:

- Total number of applications
- Number of successful applications
- Length of time between different application stages

Business Questions

Has a person previously made an application?

Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

Employee Separation Worksheet

This worksheet enables you track termination reasons by type, date, and length of service, allowing you to spot trends among leavers. For each termination, you can:

- Compare termination reasons to discover trends.
- Compare the length of time in an organization against time in a job.

Business Questions

Why are employees leaving the enterprise?

Parameters

This worksheet has no parameters.

3

Talent Management

Talent Management Overview

Talent Management is essentially the management of worker competencies to meet enterprise objectives. Oracle HRMS, Oracle SSHR, and Oracle Learning Management (OLM) each supply key components of the Talent Management functionality. For many talent-management tasks, you can use either the Oracle HRMS forms-based interface or the SSHR interface.

Oracle HRMS and Talent Management

The Oracle HRMS Talent Management functionality encompasses competency management, career paths, education and qualifications, events, and reviews.

Competency Management

Competencies are measurable skills a workforce either has or must develop to meet enterprise objectives. The Oracle HRMS competency management functions enable you to:

- Define a library of competencies or upload competency definitions from third-parties. You can use such definitions throughout the enterprise to ensure consistency of approach.
- Identify each worker's competencies in a competency profile.
- Measure competencies using either general rating scales or proficiency scales that are specific to the competency.
- Define the competency requirements of a business group, organization, job, or position.
- Define core competencies for a business group or organization. All workers in the

business group or organization must have its core competencies.

- Link competencies to qualifications.

Career Paths

You can define career paths based on either job progression or position progression. You define job-based career paths using the Oracle HRMS Map Career Path function. For position-based career paths, you use new or existing position hierarchies.

Education and Qualifications

The Education and Qualifications functions enable you to:

- Identify the educational and professional qualifications your enterprise recognizes.
- Identify the educational establishments that deliver recognized qualifications.
- Record qualifications obtained by each worker.

Events and Reviews

You can set up an event, such as a training course or departmental meeting, and identify employees who are to attend the event. You use this functionality for scheduling training courses only if you are not using Oracle Learning Management.

You can record information about any employee review meeting, such as a performance review, disciplinary hearing, or medical test, using the Employee Review function.

Work Preferences

You can enter work preferences (such as preferred work locations and work hours) for an individual in the Oracle HRMS Work Preferences window.

Oracle SSHR and Talent Management

Managers, HR professionals, and employees can access talent-management functions using SSHR.

Competency Profile

Managers can use the self-service Competency Profile function to update the competency profiles of their subordinates. Employees can use this function to update their own competency profiles.

Suitability Matching

Managers and HR Professionals can use the self-service Suitability Matching function to

find a person for a work opportunity or a work opportunity for a person. The process uses factors such as a person's current role, a person's competency levels (as defined in their competency profile), and succession plans in identifying candidates and opportunities. Employees can use this function to find opportunities suited to their competency levels.

Succession Planning

The Succession Planning functionality enables managers to plan for future vacant positions by identifying possible successors for employees, jobs, and positions.

Education and Qualifications

Managers can use the self-service Education and Qualifications function to update records of educational qualifications obtained by their subordinates. Employees can use this function to update their own records.

Other Professional Qualifications

Managers can use the self-service Other Professional Qualifications function to update records of professional qualifications obtained by their subordinates. Employees can use this function to update their own records.

Events and Bookings

Managers can use the self-service Event and Bookings function to create events and event bookings for their subordinates. Employees can use this function to create events and event bookings for themselves.

Employee Reviews

Both managers and employees can use the self-service Employee Review function to set up review meetings and invite reviewers to attend.

Work Preferences

Managers can use the self-service Work Preferences function to enter work preferences (such as preferred work locations and work hours) for a subordinate. Employees can use this function to enter their own work preferences.

> **Note:** The purchase of a Self-Service HR license on or after June 18th, 2007 does not permit the use of Oracle Performance Management. You must purchase a separate Oracle Performance Management license in addition to an Oracle Self-Service HR license to use the Appraisals, Questionnaire Administration, and Objectives Management self-service functions.
>
> See: Oracle Performance Management Overview, *Oracle Performance*

Oracle Learning Management (OLM) and Talent Management

Oracle Learning Management (OLM), formerly Oracle Training Administration, is a complete system for the definition and delivery of training. OLM is tightly integrated with the talent-management functionality of HRMS. For example:

- When a learner completes a class, OLM can automatically update the learner's competency profile with the competencies and competency levels delivered by the class.
- An appraisal can include a learning path, which identifies classes to be taken by the appraisee.

Oracle Learning Management requires a separate license.

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

Reporting in Talent Management

The Talent Management functions together provide over 50 standard and HRMSi reports. These reports extract and present talent-management-related information about the individual and the enterprise.

See Reports and Processes in Oracle HRMS, *Oracle HRMS Window Navigation and Reports Guide*

Talent Management Key Concepts

For more information about the Talent Management functions, see:

- Career Paths, page 3-43
- Competencies Overview, page 3-8
- Competency Profiles, page 3-28
- Event and Attendance Administration, page 3-49
- Qualification Types, page 3-36
- Suitability Matching, page 3-30
- Succession Planning, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

Oracle Performance Management is a separately licensed product. You must purchase a separate Oracle Performance Management license in addition to an Oracle Self-Service HR license to use the Appraisals, Questionnaire Administration, and Objectives Management functions.

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

Talent Management Requirements

Oracle HRMS enables you to define all the components of a talent management system to meet the needs of your enterprise.

Oracle Performance Management is a separately licensed product. You must purchase a separate Oracle Performance Management license in addition to an Oracle Self-Service HR license to use the Appraisals, Questionnaire Administration, and Objectives Management functions.

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

What are the advantages of the competency functions?

The Oracle HRMS competency functions enable you to:

- Identify and measure consistently the knowledge, skills, and behavior displayed by your workers across the enterprise.

- Speed the deployment process within your enterprise and reduce recruitment costs. You can identify and select workers and applicants on a common basis and match them with opportunities that arise across the whole enterprise. This ensures that an able candidate is not rejected because of a mismatch for one vacancy when other suitable vacancies exist.

- Ensure your enterprise meets its business goals. You do this by linking the competencies held by your workers into the competencies required to meet the business goals of your enterprise.

Can I perform competency evaluation during appraisals?

Yes. Oracle HRMS's highly configurable web interface enables you to perform competency-based evaluation as part of the appraisal process. You create appraisal templates, which can include competency assessment templates, to define the structure of the appraisal.

Can I define my enterprise's career paths in Oracle HRMS?

Yes. Oracle HRMS enables you to define career paths based on either job progression or position progression. You use the model that best reflects the structure of your enterprise.

Can I link competencies to qualifications?

Yes. You can link a person's acquisition of competencies to their achievement of formal qualifications, typically awarded by external, nationally recognized bodies. Such competencies have well defined performance standards that an assessor uses to determine whether a person has achieved a competency. Thus, you can measure workforce competencies against both enterprise *and* industry or national standards. You can encourage your workforce to acquire such qualifications by developing related competencies, thereby improving the enterprise skill base.

How can I use the suitability function in my enterprise?

Managers and HR Professionals can use the self-service Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. The process uses factors such as a person's current role, a person's competency levels (as defined in their competency profile), and succession plans in identifying candidates and opportunities. Employees can use this function to find opportunities suited to their competency levels.

Can I create succession plans?

You can use the Succession Planning functionality to plan for future vacant positions by identifying possible successors for employees, jobs, and positions.

How can I use Oracle Learning Management (OLM) to help with talent management?

OLM enables you to record the competencies that a course is expected to deliver. You can then use this information to update the competency profiles of the learners who have attended a class.

> **Important:** This software should not be used as the sole method of assessment for making judgements about hiring, performance, or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.
>
> It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.

All personal information that you store or use with this software must be up to date, accurate and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

Can I use HRMS Intelligence to investigate and monitor career management?

Yes. HRMS Intelligence Reports, Discoverer Workbooks, and Performance Measures enable you to investigate competencies, proficiencies, appraisal activity, and training in your enterprise. You can use HRMS Intelligence to answer business questions such as:

- Who has the required competencies for the job?
- How quickly can I improve the skills of a group of people, and at what cost?
- How do a worker's competencies compare with those required by a particular job?
- Do my employees need more training?

I need to enter competency information from a third-party skills vendor. How can I do this efficiently?

You can quickly and efficiently load competency details from a third-party skills vendor directly into Oracle HRMS using Web Applications Desktop Integrator (Web ADI). Web ADI enables you to manipulate and upload competency information, such as rating scales, rating levels, and competencies, from a text file or spreadsheet into the application. This means you can automatically load data into the application without having to enter the details individually.

See: Uploading Third-Party Competency Information, page 3-20

Competencies

Competencies Overview

In Oracle HRMS, a competency is any measurable behavior or ability that is required by the enterprise and that a worker demonstrates in the work context. For example, a competency can be:

- Knowledge (such as knowledge of consumer-protection or taxation laws)
- A skill (such as negotiation or critical thinking)
- An attitude (such as tenacity or commitment)
- An attribute (such as absence of color blindness or perfect pitch)

Competency definitions are the basis of many talent-management activities. In particular, you can define:

- A *competency profile* for each worker showing the worker's level of proficiency in various competencies

  See: Competency Profiles, page 3-28

- The *competency requirements* of a business group, organization, job, or position to enable you to identify suitable candidates for vacancies and assess workers against these requirements.

  See: Competency Requirements, page 3-22

Global and Local Competencies

You can define competencies that are available to a particular business group. Alternatively, you can create global competencies, which are available throughout the enterprise, provided that your system administrator has identified a global competence key flexfield structure on the HR:Global Competence Flex Structure profile option.

Global competencies are most useful if your enterprise operates in multiple countries but you want to use the same competency definitions in all legislations.

Competency Measurement

The HRMS competency functions enable you to set performance expectations for your workers that are consistent and objective.

During appraisal activities, HRMS enables you to assess the degree to which a worker

possesses a competency. For example, for the negotiation skills competency, a worker's proficiency level could be 3 on a scale of 1 through 5, where 5 indicates the greatest expertise.

See: Competency Measurement, page 3-11

Defining Competencies

You can define competencies individually in the Competencies window. Alternatively, you can upload multiple global competencies from third-party suppliers using the Oracle HRMS Web ADI interface. This approach may be useful to enterprises implementing competency support for the first time.

See: Defining Competencies, page 3-15 and Uploading Third-Party Competency Information, page 3-20

Unit Standard Competencies

Some legislations identify a special type of competency known as a *unit standard competency*. (A Unit Standard is typically a nationally registered document that describes performance standards for a competency. Industry representatives define and maintain the Unit Standard.)

A formal qualification results from the achievement of one or more unit standard competencies. Such qualifications are registered with a national Qualifications Framework, which identifies, for example, the number of credits attached to the qualification and to its constituent competencies, the awarding body, and the field of learning to which the qualification belongs.

Competency Types

If your enterprise defines many competencies, you may find it helpful to classify them by type. For example, you can define a competency type of Language Skills to include any language competency that your enterprise values (such as written Spanish, spoken Spanish, written Japanese, spoken Japanese, and so on). You can then retrieve competency definitions by type.

See: Competency Types, page 3-14

Rating Scales

Rating scales describe competencies and objectives in a general way.

Rating scales are of three types:

- **Proficiency scales** measure a person's mastery of a skill or technique. For example, a person's management skills could be:

1. Basic
2. Good
3. Excellent
4. Expert

You apply proficiency rating scales to competencies only. You can apply a single proficiency scale to multiple competencies. (Alternatively, you can define proficiency levels that are unique to a competency. See: Competency Measurement, page 3-11)

You can measure unit standard competencies using proficiency rating scales. You may want to measure all enterprise competencies using the same scale, for example. However, you must also define outcomes and assessment criteria for unit standard competencies if they are to lead to formal qualifications.

- **Performance scales** measure a worker's *delivery* of a competency or objective. A worker's competency can rank high on a proficiency scale but less high on a performance scale, or low on a proficiency scale but much higher on a performance scale. You can select a performance rating scale when defining competency assessment templates, objective assessment templates, and appraisal templates.
- **Weighting scales** measure the importance of a competency to the enterprise. For example, a competency's importance could be one of:
  1. Low
  2. Medium
  3. High

  A skill that is extremely important to the enterprise would attract a higher weighting than one that is occasionally relevant or of minor importance. You can select a weighting scale when defining a competency assessment template.

  Note: You can also apply weighting values to objectives. However, you do not use weighting scales. Instead, the lookup HR_WPM_WEIGHTING defines a single scale for use throughout the enterprise.

You can create rating scales that are available to a particular business group only or you can create global rating scales that are available to all organizations within your enterprise, irrespective of the setting of the HR: Cross Business Group profile option. If you use more than one rating scale of a particular type (for example, if you use multiple proficiency rating scales), ensure they are comparable by giving high numbers to high

ratings and low numbers to low ratings.

Default Rating Scales

When you define a proficiency, performance, or weighting scale, you can make it the default scale of that type either within the current business group or globally. A default rating scale applies only when you define competencies.

Rating Scale Attachments

You can add attachments to rating scales. For example, you can attach a competency or objective description or a video of a person demonstrating a skill.

Competency Measurement

To measure competencies, you can define:

- **Proficiency levels**, which are specific to a single competency
- **Proficiency rating scales**, which you can apply to multiple competencies

Proficiency Levels

Each proficiency level that you define for a particular competency has a brief description and a detailed behavioral indicator that enables an assessor accurately to identify a worker's proficiency level.

The following table shows proficiency levels and behavioral indicators for the competency Merchandise Display.

Level	Description	Behavioral Indicator
1	Novice	Has no or minimal merchandise-display experience. Has completed no recommended training.
2	Beginner	Has completed five or fewer merchandise-display activities. Has completed training level 1.

Level	Description	Behavioral Indicator
3	Intermediate	Has completed 20 or fewer merchandise-display activities. Has completed training level 2.
4	Advanced	Has significant merchandise-display experience. Has completed training level 4 and trains junior staff. The worker's merchandise displays are known to improve sales of displayed items.
5	Expert	Is an acknowledged expert by his or her peers inside and outside the enterprise. Has significant merchandise-display experience. Has completed training level 6 and trains both junior and senior staff.

The behavioral indicator for each proficiency level is detailed and specific: you could not apply these behavioral indicators unaltered to a different competency.

Proficiency levels are part of the competency definition.

See: Defining Competencies, page 3-15

Proficiency Rating Scales

Each level in a proficiency rating scale comprises a brief description and can include a behavioral indicator. However, the behavioral indicators are general enough to enable you to apply the scale to multiple competencies. For example:

Level	Description	Behavioral Indicator
1	Novice	Cannot work unsupervised.

Level	Description	Behavioral Indicator
2	Beginner	Can perform simple tasks unsupervised, but generally requires guidance.
3	Intermediate	Can perform basic tasks unsupervised, but requires guidance for more complex tasks.
4	Advanced	Can perform most tasks unsupervised, but requires occasional guidance.
5	Expert	Can perform all tasks unsupervised, and supervises others.

As this rating scale lacks detail relevant to a specific competency, you could apply it to various competencies, such as Negotiating with Suppliers, Planning Store Layouts, and Inventory Control.

See: Rating Scales, page 3-9

Which Method of Measurement?

Proficiency levels are suitable if your enterprise competencies are varied and you want to define accurately what is expected of your workforce. The result is multiple, equivalent measurement systems. Proficiency rating scales are suitable if generic proficiency levels provide enough detail for your purposes and if consistency of measurement is important.

You can use both methods. For example, you could use a proficiency rating scale for your core competencies and proficiency levels for specific job or position competencies. Whichever approach you adopt, give high numbers to high ratings and low numbers to low ratings, so that analysis of the ratings gives consistent and sensible results.

Measuring Unit Standard Competencies

For unit standard competencies, which can lead to formal qualifications, you must define outcomes and specify assessment criteria. Outcomes are nationally defined behaviors or performance standards specific to the unit standard competency. Each outcome has a set of assessment criteria. A registered assessor (from the awarding body, for example) determines whether a worker has achieved the unit standard competency by measuring the outcomes using the assessment criteria.

You can also measure unit standard competencies using proficiency levels or proficiency rating scales. For example, you may want to measure all enterprise competencies using a general rating scale, regardless of whether they lead to formal qualifications. However, the proficiency rating scale or proficiency levels must be in addition to the outcomes and assessment criteria you define for unit standard competencies.

Assessing Competencies

During an appraisal, you assess a worker's competency levels using the measurement scheme defined for each competency.

See: Assessing Competencies and Objectives, *Oracle Performance Management Implementation and User Guide*

Competency Types

Enterprises that make full use of the Oracle HRMS competency functions may create or import many competency definitions. For example, you can define the competencies required by each grade of every job or position in your enterprise. For ease of management and retrieval, you can group competency definitions into *competency types*. The types themselves are for you to define. For example, you can define competency types to differentiate various skill sets, such as management skills, language skills, neonatal nursing skills, retail management skills, and so on. Alternatively, you can define a competency type for each job or position, such as sales manager, department manager, sales assistant, area manager, and so on. A competency can belong to more than one type, and overlap between types is likely to occur.

You can retrieve competencies by competency type when searching for competencies:

- In the Find Competencies window

  See: Querying Competencies, page 3-19

- To include in the Competencies section of an appraisal when defining a competency assessment template

  See: Assessment Templates, *Oracle Performance Management Implementation and User Guide*

You can update a competency-type definition unless you have included the competencies belonging to a type in a current assessment template. This restriction prevents use of the type in multiple templates giving different results.

Defining Rating Scales

Use the Rating Scales window to define performance, proficiency, and weighting scales.

To define a rating scale:

1. Enter a name and description for the rating scale.
2. Select the rating-scale type.
3. Select Default Rating Scale to make this rating scale the default of its type either within the business group or globally.
4. To make this rating scale available to all enterprise business groups, select Global.

   Note: You cannot change this selection after saving the rating scale.

5. Enter the first level and level name. For example, enter 1 in the Level field and Novice in the Name field.
6. In the Behavioral Indicator field, describe the behaviors that define this performance level (for example, the worker cannot work unsupervised). You can enter up to 2000 characters in this field.
7. Save your work.
8. Repeat Steps 5 through 7 for subsequent levels until the rating scale is complete.
9. To add attachments to the rating scale, position the cursor in the rating-scale name field and click the Attachments icon to open the standard Attachments window.
10. Save your work.

Defining Competencies

Use the Competencies window to define competencies.

To define a competency:

1. Select New in the Find Competencies window.
2. Select either Local or Global in the Scope region.
   - A local competency is visible only within the current business group, and the competency key flexfield for the business group defines the competency name structure.
   - A global competency is visible to all business groups in your enterprise. You can select Global only if your system administrator has set the HR: Global Competency Flex Structure user profile options to Yes. The global competency

key flexfield defines the competency name structure.

Note: After saving a competency, you cannot change its scope.

If you change your scope selection before saving the competency, Oracle HRMS deletes any information that you have entered in the Name, Rating Scale, and Primary Evaluation Method fields.

3. Click in the Name field, and complete the fields in the Competence Flexfield window.

4. Enter a description for the competency.

5. If you use Oracle Projects, enter a name or code in the Alias field to identify the competency. Otherwise, leave the field blank.

6. If you are defining a unit standard competency, select Unit Standard in the Cluster field.

Note: After saving a competency, you cannot change its cluster value from Unit Standard to any other value.

Entering Rating or Proficiency Information

7. On the Valid Date and Proficiency tab, enter the dates between which the competency is valid. You must enter a start date, but you can leave the end date blank.

8. You can either select a general rating scale or define proficiency levels specific to this competency.

Note: This step applies primarily to competencies that are not unit standard competencies. Although you can select a rating scale or specify proficiency levels for a unit standard competency, you must also complete the tasks described in Entering Outcomes and Assessment Criteria, page 3-18.

To select a rating scale:

1. Select the Scale option.

2. If you have defined a default proficiency rating scale for this type of competency (local or global), its name appears automatically in the Rating Scale field. Otherwise, select a rating scale.

3. To view the selected rating scale, click Levels.

To specify proficiency levels:

1. Select the Levels option.

2. Click Levels to open the Levels window.

3. Define the first proficiency level by assigning a level number (for example, 0), a name (for example, Beginner), and a behavioral indicator (for example, the worker has no experience of inventory management and cannot perform basic tasks without supervision). Repeat this step for other proficiency levels.

Entering Competency Evaluation Details

9. Select the main method of evaluating the competency (for example, Written Examination or Peer Assessment).

10. To specify when the competency must be reassessed, enter a number in the Renewal Period field and select a unit. For example, enter 5 in the Renewal Period field and select Year if you assess the competency every 5 years.

11. Select Certification Required if you need a certificate to confirm possession of the competency. For example, you may need a driver's license to prove competency to drive.

    If you select Certification Required, enter the certification method and date whenever you include this competency in a worker's competency profile.

12. Save your work.

    The rest of this topic applies only if you are defining a unit standard competency.

Entering Qualifications Framework Details

Note: This section applies only if you are defining a unit standard competency.

13. Click the Unit Standard Qualifications Framework Details tab.

14. In the Unit Standard ID field, enter the Qualifications Framework code for the competency.

15. Select the main and subsidiary fields of learning to which the competency belongs.

    The main field of learning identifies the industry or sector to which the competency belongs (for example, Management Studies or Nursing).

    The subsidiary field identifies the subject area within the field of learning to which

the competency belongs (for example, Marketing or Neonatal Care).

16. Select the level type and level.

    Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a competency could be at Level 6 on a scale ranging from Level 1 through Level 8.

    The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).

17. Select the credit type and enter the number of credits this competency earns.

    The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a unit standard competency.

18. Select the codes that identify the provider of the unit standard competency and the provider's Quality Assurance (QA) organization.

Entering Qualifications Information

Note: This section applies only if you are defining a unit standard competency.

19. Click Qualifications to open the Competency Qualifications window.

20. In the Qualification Links region, select the name of a qualification to which this unit standard competency contributes.

    The identifier of the selected qualification appears automatically.

21. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).

22. Repeat Steps 20 and 21 for additional qualifications. (A single unit standard competency can contribute to more than one qualification.)

23. Save your work.

Entering Outcomes and Assessment Criteria

Note: This section applies only if you are defining a unit standard competency.

24. Click Outcomes to open the Outcomes and Assessment Criteria window.

25. Enter the number and name of a behavior or performance standard (for example, "Audience response above average" for a presentation skills competency).

26. Enter the dates between which the outcome is valid. You must enter a start date, but you can leave the end date blank.

27. In the Assessment Criteria field, define how to assess the outcome (for example, the audience rating for a minimum of three presentations is 60% or higher). This information must help an assessor decide whether an outcome has been achieved.

28. Repeat Steps 25 through 27 for additional outcomes.

29. Save your work.

Querying Competencies

When you open the Competencies window, the Find Competencies window opens automatically.

You can query competencies by specifying any combination of:

- Full or partial competency name
- Competency type
- Qualifications Framework qualification, which limits the search to unit standard competencies that are linked to the qualification
- Organization, job, or position, which limits the search to the competency requirements of the specified work structure

To query a competency:

1. Specify a scope value:
   - Local limits the search to competencies in the current business group.
   - Global limits the search to competencies defined as global.
2. Enter your search criteria.
3. Click Find.

   The first competency that matches your search criteria appears in the Competencies window. Scroll through additional matching competencies using the Down Arrow key.

   The competency name comprises the values you entered in the Competency

Flexfield window when you created the competency. For example, if the Competency Flexfield window has one required field and two optional fields, and you enter the competency name Teamwork in the required field and leave the optional fields blank, the competency appears in the Competencies window as "Teamwork ..", where two dots represent the empty optional fields.

Uploading Third-Party Competency Information

The Upload Third Party Skills function enables you to upload global competency definitions and rating scales from a text file or spreadsheet to Oracle HRMS using Oracle HRMS Web Applications Desktop Integrator (Web ADI).

See: Data Upload Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

1. If you intend to upload competency information from a text file, then ensure the text is formatted correctly.

   See: Format of Text Files, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   Otherwise, you can enter competency information directly into the spreadsheet that Web ADI creates.

2. Select Upload Third Party Skills from the Career Management menu, and follow the on-screen instructions to populate the spreadsheet.

   Note: Select an appropriate integrator and layout for the competency-information type that you want to upload. For example, select Upload Third Party Rating Scale integrator to upload rating scales.

3. Upload the spreadsheet contents to Oracle HRMS.

   See: Uploading Data Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   If the upload fails, correct any errors in the spreadsheet and retry the upload. Diagnostic messages appear in the Messages column at the end of each spreadsheet row.

Grouping Competencies into Types

Use the Competence Types window to group competencies into types.

Before you can perform this task, your system administrator must have added the enterprise competency types to the lookup COMPETENCE_TYPE.

To group competencies into types:

1. Query the competency type.
2. Select competencies to include in this competency type.
3. Save your work.

   Competencies that you do not add to a competency type belong to the type Other by default.

Competency Requirements

Competency Requirements

A worker's competency profile identifies competencies that the worker possesses and records the worker's proficiency level in each competency. You can also define the enterprise's *competency requirements*, which are competencies the workforce must have to deliver business success. You can use this information in various ways. For example:

- You can search for candidates for vacancies and opportunities for workers, and identify the best match between the requirements of a role and the skills and experience of the worker.
- When assessing workers during appraisals, you can compare worker competencies with the requirements and proficiency levels for their roles. Having a benchmark statement of requirements that is based on business need brings consistency and objectivity to the appraisal process.
- You can target training and other development activities to close the gap between a worker's competencies and those required by the enterprise.

You can define your competency requirements for:

- Business groups
- Organizations
- Jobs
- Positions

In addition:

- If you use Oracle iRecruitment, you can define competency requirements for vacancies.

  See: Creating and Maintaining Vacancies, *Oracle iRecruitment Implementation and User Guide*

- When using the Oracle SSHR Suitability Matching function, you can construct one-time lists of competency requirements when searching for:
  - Workers who meet those requirements
  - Work opportunities that require those competencies

See: The SSHR Suitability Matching Function, page 3-23

Business Group (Core) Competencies

Competency requirements that you define for the business group are referred to as *core competencies*. Typically, core competencies are generic and fundamental to your enterprise strategy. For example, communication skills, negotiation skills, and quality focus may be suitable core competencies in your enterprise. Every member of the business group should demonstrate the core competencies, though the degree of proficiency can vary with seniority and experience. When you define the core competencies, you specify maximum and minimum proficiency levels to encompass the acceptable range.

Organization, Job, and Position Competency Requirements

Competency requirements that you define for organizations apply to all members of the organization but are not core competencies. Competency requirements that you define for jobs and positions apply to all holders of those roles. You can also define competency requirements for particular grades within job or position. Position competency requirements automatically include the requirements of the associated business group, organization, and job.

Essential Competencies

You can designate any competency requirement as essential. The Suitability Matching function identifies workers who possess essential competencies separately from those who possess desirable (nonessential) competencies.

See: The SSHR Suitability Matching Function, page 3-23

How HRMS Uses Competency Requirements

The SSHR Suitability Matching and Appraisals functions are the primary users of competency requirements.

The SSHR Suitability Matching Function

The Suitability Matching function, which you can access from HR Professional, Employee, and Manager Self-Service menus, enables you to find workers for opportunities and opportunities for workers. The application performs this function by comparing worker competency profiles with the competency requirements of business groups, organizations, jobs, positions, and vacancies. The comparison varies with each suitability-matching action. For example, for the action Find Suitable People by Role, you can search for a worker who matches the requirements of an organization only or of a job, position, or vacancy within that organization. You can also include the core competencies in the list of requirements to match.

When you perform the search for workers who match your competency requirements, HRMS identifies workers who:

- Meet all essential and desirable competency requirements
- Meet all essential competency requirements
- Meet all desirable competency requirements
- Meet some or no essential or desirable competency requirements

See: Suitability Matching, page 3-30

The Appraisals Function

When you perform an appraisal, you can assess a worker against the competency requirements of their job or position by selecting Include Job Competencies in the competency assessment template. This selection causes the core competencies, any organization competency requirements, and the job or position competency requirements to appear in the Competencies section of the appraisal. You can use the appraisals function View Competency Gaps to identify areas for development and select training to address deficiencies.

Reporting on Competency Requirements

HRMS can generate several reports that analyze competency profiles and competency requirements to provide business intelligence.

Workforce Intelligence Reporting

The Competence Requirement worksheet in the Competence (Skill) Development Detail Workbook lists the competency requirements of all organizations, jobs, positions, and grades in a business group.

See: Competence (Skill) Development Detail Workbook, page 3-54

Workforce Intelligence (HRMSi) Reporting

The Competence Match (Organization Hierarchy) Status Analytics Workbook provides various analyses of worker competency profiles compared with the requirements of their roles within an organization hierarchy.

See: Competence Match (Organization Hierarchy) Status Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

Defining Core Competencies

Core competencies are those required by every member of a business group, and you

define them for the business group.

Use the Competence Requirements window.

To define core competencies:

1. In the Business Group field, select a business group.
2. Click Find to display any competency requirements already defined for this business group. If the application displays existing competency requirements, you can:
   - Delete or edit existing competency requirements. To delete an existing core competency, select the competency and click the Delete icon.
   - Define additional competency requirements.
3. To define a core competency, click the first empty row of the competency table and select a competency.
4. In the Low and High fields, select the extents of the rating scale that are desirable for this competency in this business group.
5. If all workers in this business group *must* possess this competency, then select Essential. When performing suitability matches, the application lists workers who possess essential competencies separately from those who do not.
6. Enter the date from which this competency is required in this business group.
7. Repeat Steps 3 through 6 to define additional core competencies for this business group.
8. Save your work.

What's Next

You can also define competency requirements for organizations, jobs, and positions.

See: Defining Organization, Job, and Position Competency Requirements, page 3-25

Defining Organization, Job, and Position Competency Requirements

You can identify the competencies that workers in an organization or holders of jobs or positions must possess. When you use the Suitability Matching function or advertise a vacancy, the application can compare worker competencies with the competency requirements for an organization, job, or position to find suitable candidates.

Use the Competence Requirements window.

To define competency requirements for an organization, job, or position:

1. Select the organization, job, or position.

2. Click Find to display existing competency requirements. Note that positions inherit competency requirements defined for the business group (the core competencies), organization, and job with which they are associated. If the application displays existing competency requirements, then you can:

   - Delete or edit existing competency requirements. To delete an existing competency requirement, select the competency and click the Delete icon.

   - Define additional competency requirements.

3. To define a competency requirement, click the first empty row of the competency table and select a competency.

4. In the Low and High fields, select the extents of the rating scale that are desirable for this competency in this organization, job, or position.

5. If all workers in this organization, job, or position must possess this competency, select Essential. When performing suitability matches, the application lists workers who possess this competency separately from those who do not.

6. For jobs and positions only, select a grade, if appropriate.

7. Enter the date from which this competency is required.

8. Repeat Steps 3 through 7 to define additional competency requirements for this organization, job, or position.

9. Save your work.

Related Topics

Copying Competency Requirements, page 3-26

Copying Competency Requirements

You can copy the core competencies (those defined as required for the business group) or competency requirements defined for an organization, job, or position to another organization, job, or position.

Use the Competence Requirements window.

To copy competency requirements:

1. Select the organization, job, or position to which you want to copy competency requirements.

2. Click Copy Competencies.

   The Copy Competencies window opens.

3. To copy the core competencies, leave Core Competencies selected. Otherwise, deselect core competencies and select the organization, job, or position from which you want to copy the competency requirements.

4. To copy the proficiency levels, leave Copy Levels selected. Otherwise, deselect this value. Note that, if you copy the proficiency levels, then you can edit them after copying.

5. Specify the date from which these competency requirements apply to your organization, job, or position.

6. Click Copy Competencies.

7. Edit or delete any of the copied competency requirements, if required. For example, you may want to enter a grade for competency requirements that you copy to a job, change the validity dates of a requirement, or delete duplicate requirements.

8. Repeat this procedure from Step 2 to copy additional competencies, if appropriate.

9. Save your work.

Viewing Competency Requirements

Use the Competence Requirements window to view competencies required at the business group, organization, job or position level.

To view competency requirements:

1. Select the business group, organization, job, or position.

2. Click Find.

   The application displays competency requirements defined for the specified work structure.

Competency Profiles

Competency Profiles

A competency profile is a list of a worker's competencies showing the worker's level of proficiency in each competency. For unit standard competencies, which the worker usually acquires in increments, the competency profile shows whether the competency is In Progress or Achieved.

Setting Up the Competency Profile

You can create a worker's competency profile when the worker first joins the enterprise using details from the worker's resume, tests, or interviews. You can also copy competency requirements from a vacancy definition in Oracle iRecruitment to a competency profile.

Copying Core or Primary Assignment Competencies to the Competency Profile

Some competencies are important for all employees throughout your enterprise. Such competencies are referred to in Oracle HRMS as *core competencies*, and you define them as competency requirements for the business group. Other competencies are required for particular organizations, jobs, positions, or grades within job or position. You can copy both the core competencies and any competency requirements associated with a worker's primary assignment to the worker's competency profile. This feature enables you to set up a worker's competency profile efficiently and ensures that you assess the worker's proficiency in all relevant competencies.

See: Creating a Competency Profile, page 3-32

Maintaining Competency Profiles

You can update a worker's competency profile at any time using:

- The Manager Self-Service Competency Profile function
- The Employee Self-Service Competency Profile function
- The Competence Profile window in the forms-based interface

If you need to recertify a competency at intervals (for example, annually), then you can define a periodic alert (using Oracle Alert) to notify you as the recertification date approaches.

Assessing Competencies in an Appraisal

You can assess a worker's competencies during an appraisal if you include a competency assessment template in the appraisal template. Otherwise, no Competencies section appears in the appraisal. Competency assessment templates can include some competencies (for example, those required by a worker's job) by default. You can update the Competencies section for a worker during the appraisal process. For competencies already included in the worker's competency profile, the worker's current proficiency level appears in the Competencies section of the appraisal.

See: The Appraisal Template, *Oracle Performance Management Implementation and User Guide* and Assessment Templates, *Oracle Performance Management Implementation and User Guide*

HRMS can update a worker's competency profile automatically after an appraisal. You can enable this feature at site level by setting the user profile option Apply Assessment Competencies to Person to Yes.

See: Setting Up the Appraisal Process, *Oracle Performance Management Implementation and User Guide*

Alternatively, you can enable this feature at appraisal level by selecting Update Competency Profile in the appraisal template.

See: The Appraisal Template, *Oracle Performance Management Implementation and User Guide*

When you enable this feature, HRMS writes the new proficiency level (allocated to the worker on the Final Ratings page of the appraisal by the main appraiser) to the worker's competency profile.

The Competency Profile and Oracle Learning Management

Training is the primary method of acquiring new skills and developing existing skills. Users of Oracle Learning Management can configure the application to update learners' competency profiles automatically on successful completion of training.

See: Competencies, *Oracle Learning Management Implementation Guide* and Configuring Competency Update Automation, *Oracle Learning Management Implementation Guide*

How HRMS Uses Competency Profiles

The Oracle HRMS Self-Service Suitability Matching function enables you to:

- Find workers for opportunities.
- Find opportunities for workers.

The application performs this function by comparing worker competency profiles with the competency requirements of vacancies, jobs, and positions.

See: Suitability Matching, page 3-30

Reporting on Competency Status

HRMS can generate several reports that analyze competency profiles and competency requirements to provide business intelligence.

Workforce Intelligence Reporting

The Competence (Skill) Development Detail Workbook provides two worksheets of interest:

- The Person Competence Profile Worksheet identifies workers with similar competency profiles and enables you to compare the competency profiles of workers at the same grade.
- The Competence Delivered by Training Activity worksheet identifies competencies workers acquire by means of formal learning activities.

See: Competence (Skill) Development Detail Workbook , page 3-54

The Competence Updates after Appraisal workbook provides a summary of changes made to competency profiles (either automatically or manually) after appraisal completion.

See: Competence Updates after Appraisal Workbook, page 3-55

Workforce Intelligence (HRMSi) Reporting

The Competence Levels (Organization Hierarchy) Detail Analytics Workbook displays, for an organization hierarchy, each worker's proficiency level in a selected competency.

See: Competence Levels (Organization Hierarchy) Detail Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

The Competence Match (Organization Hierarchy) Status Analytics Workbook compares the competency requirements of a job with the competency profiles of workers occupying that role.

See: Competence Match (Organization Hierarchy) Status Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

Suitability Matching

The SSHR Suitability Matching function, which is available to HR Professionals, managers, and workers, enables you to compare a worker's competency profile and work preferences with the requirements of a work opportunity.

Depending on the responsibility used, the default Suitability Matching page offers users between four and ten suitability-matching options. For example, workers can use this function to search for work opportunities for themselves, and managers and HR

Professionals can use this function to find candidates for work opportunities.

The available suitability-matching options are shown in the following table.

Suitability Matching Options

Category	Option	Access by Responsibility
Find a Person for a Work Opportunity	Find Suitable People by Role	Manager, HR Professional
Find a Person for a Work Opportunity	Find Suitable People by Competency	Manager, HR Professional
Find a Person for a Work Opportunity	Compare People by Current Role	Manager, HR Professional
Find a Person for a Work Opportunity	Compare Named Successors for a Position	HR Professional
Find a Person for a Work Opportunity	Compare Applicants for a Vacancy	Manager, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Role	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Competency	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Pending Applications	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Succession Options	HR Professional
Find a Work Opportunity for a Person	Compare Current Assignments	Manager, Employee, HR Professional

Creating a Competency Profile

Use the Competence Profile window to create, view, and update a worker's competency profile. Alternatively, you can use the SSHR Competency Profile function, which is available to both employees and managers.

The Competence Profile window displays all competencies, past and present, held by the worker. To see only current competencies and proficiency levels, select Current Competencies. If a worker has a competency profile in more than one business group, then you can see, but not update, any *global* competencies the worker acquired in other business groups.

To populate a worker's competency profile, you can:

- Add competencies individually to the profile.
- Copy competencies to the profile.

The amount of information you enter for a competency depends on the competency type: unit standard competencies require more information than non-unit-standard competencies.

See: Competencies Overview, page 3-8

To add individual competencies to a competency profile:

1. Select the first competency this worker possesses.
2. Select the worker's proficiency level in this competency.

   Note: If you update a proficiency level, enter the date from which the new level applies. When you save the competency profile, HRMS automatically ends the previous proficiency level on the day before the new level starts.

3. Enter the date from which the worker possesses the competency at this level. You can enter an expiry date, if required.
4. In the Source of Proficiency Rating field, you can select the method, such as training course or previous experience, by which the worker gained the competency.

   The Status Field

   The Status field, which is read only, can contain the value Achieved or In Progress.

   - When the worker has achieved all outcomes for a unit standard competency, its status is Achieved. Otherwise, its status is In Progress.

When you save the competency profile, Oracle HRMS changes the status of a unit standard competency from In Progress to Achieved if the person has achieved all outcomes for the competency.

- All non-unit-standard competencies have the status Achieved, by default.

When you add a competency to the profile, the Status field is blank. Oracle HRMS populates the field only when you save the competency profile.

Entering Certification Details

5. Click the Certification tab.

6. Select the certification method (for example, examination) for the competency, and enter the certification date.

7. In the Next Review field, enter the date on which you must reassess the competency, if appropriate.

Viewing Qualifications Framework Details

8. **Note:** This step applies to unit standard competencies only.

   Click the Unit Standard Qualifications Framework Details tab.

   The Qualifications Framework Details for the unit standard competency appear, including the number of credits associated with the competency, the field of learning to which the competency belongs, and the unit standard identifier.

9. Repeat from Step 1 to select additional competencies.

10. Save your work.

To record outcomes achieved:

Note: This procedure applies to unit standard competencies only.

You record outcomes achieved towards a unit standard competency in the Outcomes Achieved window.

1. Select a unit standard competency and click the Outcomes Achieved button.

2. Select the name of the outcome achieved towards the selected unit standard competency.

   The assessment criteria for this outcome appear in the Assessment Criteria field.

3. In the Date From field, select the date on which the outcome was assessed as achieved.

4. If you must reassess the outcome at a future date, enter that date in the Date To field.

5. Repeat from Step 2 for additional outcomes for this unit standard competency.

6. Save your work.

   If the worker has achieved all outcomes for a unit standard competency, Oracle HRMS updates the status of the competency to Achieved when you save the competency profile. Otherwise, the competency status remains In Progress.

To copy competencies to the competency profile:

1. Click Copy Competencies to open the Copy Competencies window.

2. In the Copy Competencies window, do one of the following:

   - Select Core Competencies to copy competency requirements defined for the business group.

   - Select Primary Assignment Competencies to copy competency requirements from the organization, job, position, and grade to which the worker is assigned.

   - Select a vacancy to copy the competency requirements from a vacancy definition in Oracle iRecruitment. The application automatically copies the competencies defined for the vacancy.

3. Enter the dates between which the copied competencies are valid. You must specify a start date, but the end date is optional.

4. Click Copy.

   You can delete or update any of the copied competencies (for example, by specifying proficiency levels and certification details).

5. Save your work.

Entering Work Preferences for a Worker

You can record workers' preferences, such as their willingness to travel or relocate and their preferred working hours. When you use the SSHR Suitability Matching function to match workers to opportunities or find opportunities for workers, the application can take work preferences into account.

To enter work preferences, you can use the Self-Service Work Preferences function, which is available to both managers and employees.

In the forms-based interface, use the Work Preferences window, accessed from the People window.

To enter work preferences for a worker:

1. Select any relevant work capabilities. For example, if a worker will accept international travel but is not willing to relocate domestically, select Visit Internationally but leave Relocation Required for Position deselected.
2. Enter the worker's preferred working hours and work schedule.
3. Complete the International Deployment region if the worker is willing to relocate or travel internationally.
4. Save your work.

Related Topics

Entering Work Choices for a Job or Position, *Oracle HRMS Enterprise and Workforce Management Guide*

Qualifications

Qualification Types

Oracle HRMS enables you to record the types of qualifications recognized by your enterprise, including:

- Educational and vocational qualifications
- Licenses
- Awards
- Honors

You can rank qualifications. For example, you could rank a doctorate as 1, a master's degree as 2, a bachelor's degree as 3, and so on. You can rank equivalent qualifications at the same level. For example, you could rank both a bachelor's degree and a vocational qualification as level 3. This feature is useful for identifying all workers qualified at level 3 or above, for example.

Qualifications Framework Qualifications

Qualifications Framework qualifications result from the achievement of unit standard competencies. For this type of qualification, you record national Qualifications Framework details, including the number of credits attached to the qualification, the awarding body, and the field of learning to which the qualification belongs.

Schools and Colleges

You can identify the schools and colleges that deliver the qualifications that your enterprise recognizes so that you can record where a worker gained a qualification. As schools and colleges are available to all business groups, you have to define them once only.

Defining Qualification Types

Use the Qualification Types window to define the qualifications that your enterprise recognizes.

Before you start this task, your system administrator must define generic qualification types (such as Degree, Diploma, and License) in the PER_CATEGORIES lookup.

To define qualification types:

1. Enter the name of the qualification.
2. In the Category field, select the qualification type.
3. If required, rank the qualification.

Entering Qualifications Framework Details

Note: This section applies only if you are defining a Qualifications Framework qualification.

4. Enter the Qualifications Framework identifier for the qualification.
5. Select the Qualifications Framework qualification type (for example, Diploma, Bachelor of Arts, or School Certificate).
6. Select the main and subsidiary fields of learning to which the qualification belongs.

   The main field of learning identifies the industry or sector to which the qualification belongs (for example, Management Studies or Nursing).

   The subsidiary field identifies the subject area within the field of learning to which the qualification belongs (for example, Marketing or Neonatal Care).
7. Select the level type and level.

   Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a qualification could be at Level 3 on a scale ranging from Level 1 through Level 5.

   The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).
8. Select the credit type and enter the total number of credits for this qualification.

   The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a Qualifications Framework qualification.
9. Select the qualification provider.
10. Select the Quality Assurance (QA) organization that registered the qualification provider.

Entering Qualification Competencies

> **Note:** This section applies only if you are defining a Qualifications Framework qualification.

11. Click Competencies to open the Qualification Competencies window.
12. In the Unit Standard Competency Links region, select the name of a unit standard competency that contributes to this qualification.

    The Unit Standard ID appears automatically.
13. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
14. Enter the dates between which the link is valid. You must enter a start date, but you can leave the end date blank.
15. Repeat Steps 12 through 14 for additional unit standard competencies.
16. Save your work.

Entering Qualifications

You can enter your workers' completed and in-progress qualifications when they first join the enterprise. You may need to update a worker's qualifications record after completion of a training course, for example.

> **Note:** If the worker for whom you are entering qualifications has qualifications records in other business groups, then you will be able to see, but not update, qualifications entered for the worker in those other business groups.

Workers and managers can use these SSHR functions to enter and update worker qualification records:

- Education and Qualifications
- Other Professional Qualifications

In the forms-based interface, use the Qualifications window, accessed from the People window, to enter and update qualifications.

To enter qualifications:

1. Select the qualification type, and enter its title.

For information about defining qualification types, see: Defining Qualification Types, page 3-36

2. Select the qualification status, for example, ongoing or completed.
3. Enter the grade at which the worker holds the qualification, if appropriate.
4. Select the establishment at which the worker gained the qualification. The list comprises establishments you recorded the worker as having attended.

   See: Entering Schools and Colleges Attended, page 3-41
5. Enter the name of the body that awards the qualification. If you record this value in the qualification types record for a Qualifications Framework qualification, it appears here automatically.
6. Enter the dates between which the worker studied for the qualification. Leave the end date blank if the qualification is in progress.
7. Enter the worker's ranking in the study group, if relevant.
8. Save your work.

To enter license details:

1. Click the License tab.
2. Enter the license number, for example, a driver's license number.
3. Enter any restrictions on the license. For example, the license may not be valid in certain states.
4. Enter the license expiry date.

To enter tuition fees:

1. Click the Tuition tab.
2. Enter the fee amount, and select the currency.
3. Select the tuition method, for example, day release.
4. Specify how the worker's tuition fees will be reimbursed (for example, bank transfer when the qualification is awarded).

To enter training details:

1. Click the Training tab.

2. Enter the amount of training completed. For example, enter 30 days completed of a training program that lasts 60 days.

3. Enter the total amount of training required to deliver the qualification (for example, 60 days).

4. Enter the units in which the training is measured, for example, days.

To enter professional membership details:

1. Click the Professional Membership tab.

2. Select the professional body to which the person belongs. The list comprises organizations with the classification Professional Body.

3. Enter the worker's membership number and category.

   The available membership categories depend on the table used to calculate subscription rates for the professional body. Oracle Payroll uses this table when calculating the amount to deduct from a worker's salary during the payroll run.

4. Select the method by which the subscription is to be paid. This is optional and for information only.

To view Qualifications Framework details:

Note: This section applies to Qualifications Framework qualifications only.

1. Click the Qualifications Framework Details tab.

2. Details of the selected qualification appear. For example, you can see its ID, the field of learning to which it belongs, and the number of credits earned. You cannot update this information.

To enter subject details:

1. Save your work.

2. Select the first subject the qualification comprises.

3. Select the subject status, for example, passed or ongoing.

4. Enter the dates between which the subject is studied. You must enter a start date, but you can leave the end date blank.

5. If the subject forms a major part of the qualification, select Major.
6. Optionally, enter the grade at which the worker studies the subject.
7. Enter further subjects, as appropriate.
8. Save your work.

Defining Schools and Colleges

Use the Schools and Colleges window to define the establishments that deliver the qualifications that your enterprise recognizes.

To create establishments:

1. Enter the establishment name.
2. Enter the location name.
3. Repeat Steps 1 and 2 for additional establishments or locations.
4. Save your work.

   These establishments appear in the list of schools and colleges in the Schools and Colleges Attended window.

Entering Schools and Colleges Attended

Use the Schools and Colleges Attended window, accessed from the People window, to enter a worker's attendance at educational establishments.

> **Note:** If a worker has person records in other business groups, then you can see, but not update, any establishment information entered for the worker in those other business groups.

To enter schools and colleges attended:

1. Select the name of the school or college attended.

   If the school or college does not appear in the list of values, then you can enter the information in the name field.

   > **Note:** If you enter the name of the school or college, then it is available for this worker only. To update the global list of schools and colleges that is available to all workers, see: Defining Schools

and Colleges, page 3-41

2. Enter the attendance dates, and indicate whether the worker's attendance was full time. If the attendance is ongoing, then leave the end date blank.

3. Repeat Steps 1 and 2 for additional establishments.

4. Save your work.

In a worker's qualifications record, you select the establishment at which the worker gained a qualification from the list of schools and colleges the worker attended.

Career Paths

Career Paths

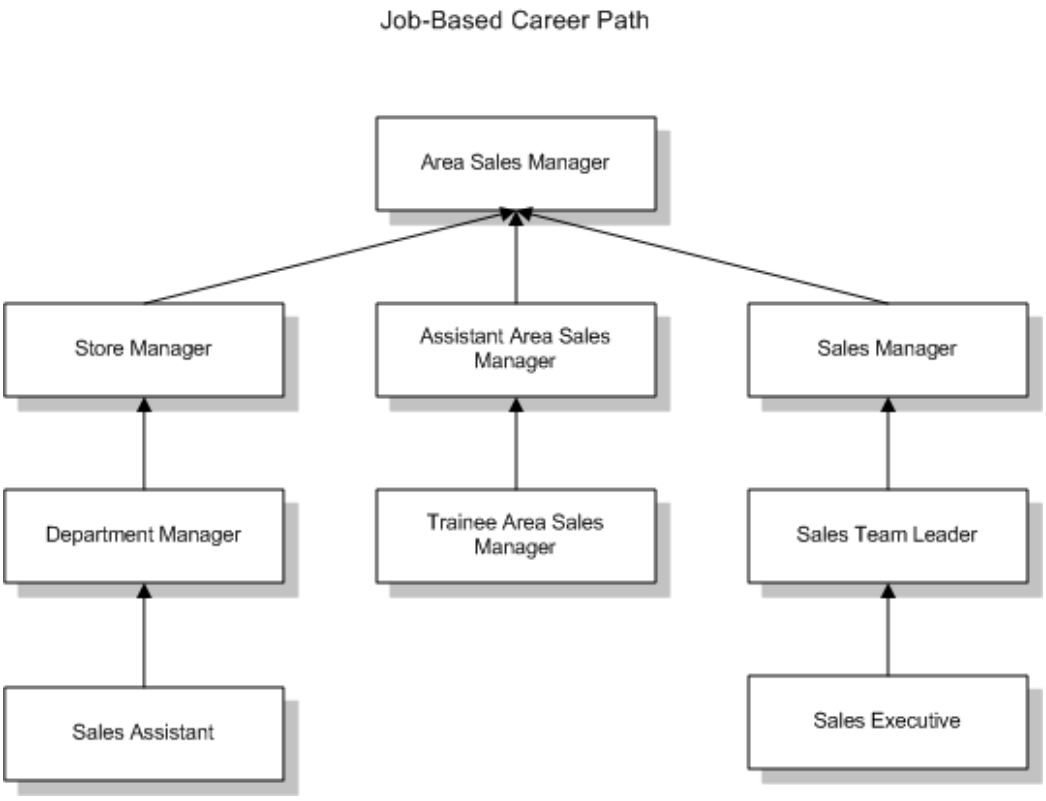
A career path defines a route to a job or position from a different job or position that is lower in the hierarchy. You can base career paths on either job progression or position progression, but not both. A job or position can appear in multiple career paths, but once only in any single career path.

You can identify career paths for a worker in various ways. For example, you can include the names of possible career paths:

- In the Overall Rating and Comments or Advancement Potential sections of the worker's appraisal
- In appraisal questionnaires
- In a document or in comments attached to a worker's record

Career Paths Based on Job Progression

The career path is a hierarchy of jobs that you build from the top down. For example, for the job Area Sales Manager, you could define the following career path to show possible routes to that job:



See: Defining Career Paths, page 3-44

Lines of Progression for Affirmative Action Plan (AAP) Reporting (U.S. Only)

For the AAP-Workforce Analysis report, you use career paths based on job progression to define lines of progression.

Career Paths Based on Position Progression

For career paths based on position progression, you define a standard position hierarchy.

See: Creating a Position Hierarchy, *Oracle HRMS Enterprise and Workforce Management Guide*

Defining Career Paths

A career path shows a route to a job or position from a different job or position.

You define career paths for positions using position hierarchies.

See: Position Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

You define career paths for jobs using the Career Path Names window and the Map

Career Path window.

To define a career path based on job progression:

1. In the Career Path Names window, enter the names of the career paths you want to define.

2. Save your work.

3. Open the Map Career Path window. In the Name field, select the top job in the career path you are mapping.

4. In the Career Path Name field, select the name of a career path you defined in Step 1.

5. In the Job Progression From block, select all jobs that are one level down from the job identified in the Name field.

6. To extend the career path downwards from any one of these jobs, select the relevant Down check box.

   The window now shows your selected job in the Name field. The Job Progression To field now shows the job at the top of the career path.

7. Repeat Steps 5 and 6 until the career path is fully defined. To move back up the career path, select the Up check box.

8. Save your work.

Skills Matching

The Special Information Approach to Skills Matching

From Release 11 onwards, the recommended approach to holding and matching skills information is to define a framework of competencies. These provide the common language for a wide range of human resource activities including assessments, appraisals, employee profiling, career development, and recruitment. You can build up a wealth of skills information that can be maintained and used by employees and line managers themselves, using the web Direct Access interface.

However, Oracle HRMS continues to support the earlier approach to handling skills information, using Special Information Types. This is an alternative to the competence approach.

What are Special Information Types (SITs)?

Special Information Types are a flexible way to hold additional information you require about people and, if necessary, to compare this information with the requirements of jobs or positions. For each Special Information Type you can define up to thirty fields to hold details of competencies, professional qualifications, education, and valid experience. For each person, job, or position, you can make multiple entries for each Special Information Type.

For example, suppose you want to store details of technical skills. You could set up the following fields:

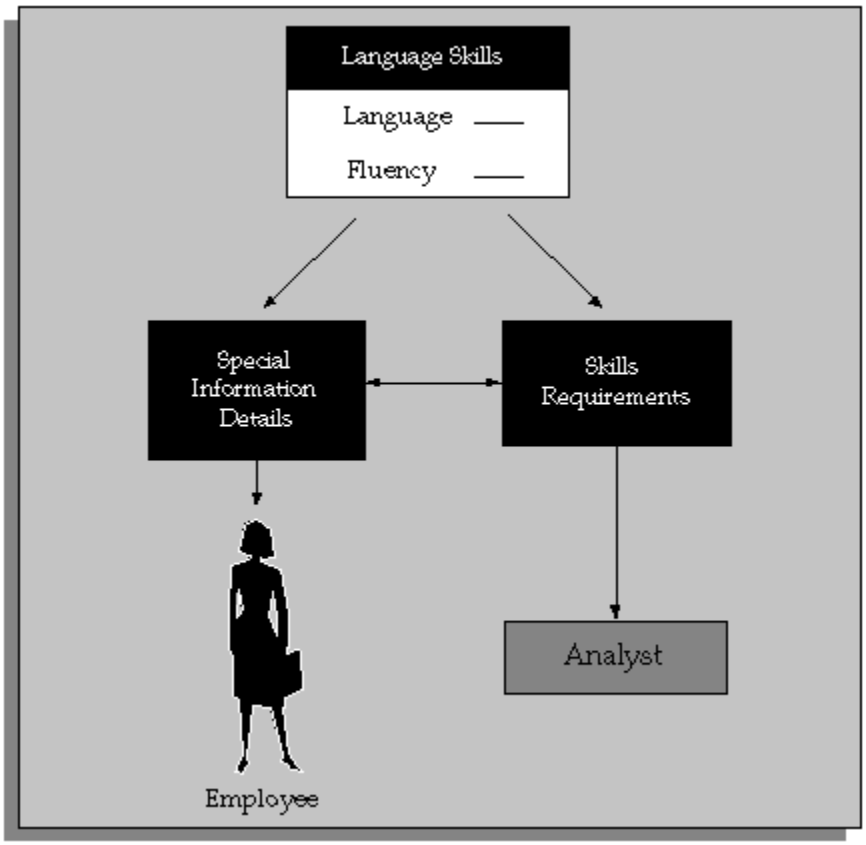
- Skills - with a list of valid values to control the vocabulary used to describe the skills
- Years Experience - to hold the number of years of experience in using the skills

You can display the fields you define in one or more of the following windows:

- Special Information, to record skills or experience for an employee or applicant
- Job Requirements, to hold skill requirements for a job
- Position Requirements, to hold skill requirements for a position
- Skill Provisions, to record the skills or qualifications provided by training activities in Oracle Training Administration

Using views and reports, you can then match people to posts, according to their skills or other attributes.

Matching Skills Requirements to Special Information



Tips for Defining Special Information Types to Hold Skills Information

- If you want to give different sets of people access to different categories of skills information, define each category as a separate Special Information Type. You can configure the Special Information window to display just one Special Information Type.

- If you want to match on a *range* of skills levels, it is easier to use numeric values. Use a description field to provide the meaning for each level. The description appears automatically when the number is chosen.

- You can use cross-validation to ensure that users enter correct combinations of segments. For example, you could ensure that when a language skill is entered, a fluency level is also selected.

- You can speed up data entry and minimize errors by defining an 'Alias' for common combinations of segment values. For example, completion of a course may always result in a specific certificate from a particular licensing body. A user could enter all of these values with a single Alias.

- If you want users to enter the precise title of a qualification (perhaps read from a resume), you cannot supply a list of values. However, consider providing additional fields with lists of values using broad terms such as 'degree-level' or 'science' to help users searching for information.

Unstructured Information

You may want to hold some skills information, such as resumes, as unstructured, free text information. You can store this information as attachments to the People and Special Information windows.

Skills Matching Report

The standard Skills Matching Report matches people against all the requirements you have entered for one job or position (held in Special Information Types).

The List People By Special Information window displays a list of people who match a particular profile for one Special Information Type.

Running the Skills Matching Report

This report matches employees, applicants, or both against the requirements of one job or position (held in Special Information Types). You can select the closeness of the match you require.

You run reports in the Submit Requests window.

To run the Skills Matching Report:

1. In the Name field, select Job and Position Skills Matching Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the Job or Position to which you want to match people.
4. Select the person type, or types, you require.
5. Select the closeness of match you require from one of the following levels:
   - One or more essential skills
   - All essential skills
   - All essential and one or more desirable skills
6. Choose the Submit button.

Event and Attendance Administration

Event and Attendance Administration

You can use the events and attendance administration features in Oracle Human Resources to:

- Set up events
- Book employees and applicants onto events
- Record information about employee interviews, such as disciplinary hearings and performance reviews

> **Note:** The system administrator can create configured versions of the Event Bookings window so that you use one version for employees and another version for applicants.

Event Bookings and Attendance

You can view all the events a person has attended or is scheduled to attend in the Oracle HRMS Book Event window. You can also enter new bookings here. See: Creating a Booking Event, page 3-51

Employee Reviews

You can use the Employee Review window to record information about any employee interview, such as a performance review, disciplinary hearing, or medical test.

To prepare for a performance review, you can view the employee's:

- Career history, using the Assignment History window

  See: Viewing a Worker's Assignment History, page 2-235

- Likely career paths

  See: Career Paths, page 3-43

If you are using Oracle Self-Service Human Resources (SSHR), you can use web-based access to complete assessment and appraisal templates for your employees.

Events, Reviews and Competence Profiles

If you have adopted the competence approach, you can use events or reviews as an

opportunity to update your employees' competence profiles. For example, you may decide that employees' attendance at a team-leading seminar provided them with the Team-Leading competence at level 1. Once you have determined the competencies delivered by the event, you can update the appropriate employees' competence profiles.

Entering Performance Ratings

You carry forward details from the Employee Review window to the Performance window (which opens from the Salary Administration window). In this window, you can enter performance ratings for an employee at any time. You can also schedule the next performance review, and, optionally, associate a salary change with a performance review.

> **Note:** You cannot use a performance review entered through Oracle Self-Service Human Resources (SSHR).

In order to perform this task, performance rating values for the Lookup Type PERFORMANCE_RATING must have been defined.

To enter a performance rating for an existing review:

1. Select an existing review by one or all of the following:
   - Date
   - Location
   - Type
2. Select a performance rating.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically).

To enter a new review and performance rating:

1. Enter the new review date.
2. Select a performance rating, if required.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically)

Entering an Employee Review

You can record details of a review event using the Employee Review window.

Before you can enter employee reviews, different types of employee interview must have been defined as values for the Lookup Type EMP_INTERVIEW_TYPE. These interview types could include disciplinary hearings and performance reviews.

To enter a review for an employee:

1. Select an interview type, and enter a start date. The other fields are optional.

   If you select a location for the employee's review that has a time zone associated with it, the Timezone field displays the time zone with that location, regardless of your location.

2. Save the review.

3. You can select reviewers by name or employee number. Save your work.

   If you want to enter a performance rating for the employee associated with this review, navigate to the Assignment or Salary Administration window.

   See: Entering Performance Ratings, page 3-50

Creating a Booking Event

You use the Book Event window to create booking events.

> **Tip:** Your system administrator can set up the Additional Event Details descriptive flexfield to record booking statuses (such as Wait Listed, Confirmed, and Attended). This descriptive flexfield displays on the Book Event window, the Employee Review window, and the Applicant Interview window.

You can select relevant values in the Type field, such as departmental meeting or marketing presentation, only if your system administrator defines values for the Lookup Types EMP_EVENT_TYPE and APL_EVENT_TYPE. Before you create booking events, ensure that relevant values are available in the Type field.

U.S. only: All Tenure-specific events must begin with the word Tenure.

To create a booking event:

1. Select the type of event in the Type field, and then enter the date, time, supplying organization, location, and contact name.

Note: You can only select locations that are associated with a timezone. You associate a location with a timezone in the Location window.

2. Save the event.

3. You can select attendees by name or number in the Bookings block of this window.

Workforce Intelligence Key Concepts for Competencies, Qualifications and Development

Key Concepts for Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications and Development Intelligence enables you to investigate the competencies and proficiencies of employees and applicants.

The following concepts enable you to accurately interpret the results of the Competencies, Qualifications and Development intelligence reports:

Competencies and Proficiencies

Within Oracle HRMS, you define competencies and proficiencies against a person and job. If a person has multiple assignments for the same job, these reports only count the person once. This ensures that trends remain accurate.

In order to appear in the reports, people must work for the required job and grade for a competence on the report run date.

> **Note:** You must define competencies against jobs, and assign valid grades to jobs, or these reports will not be able to compare individual's proficiencies with their job competence requirements.

Workforce Intelligence for Competencies, Qualifications and Development

Competence (Skill) Development Detail Workbook

This workbook investigates the skills of your workforce, with regard to skills held by workers, skills required, or skills delivered through training, within your organization. The resulting information enables you to:

- View competencies owned by workers within your organization
- Analyze competence shortages within your organization
- Analyze competencies delivered by training

Worksheets

This workbook has the following worksheets:

- Competence Delivered by Training Activity
- Competence Requirement
- Person Competence Profile

Competence Delivered by Training Activity Worksheet

This worksheet reports on competencies delivered by training activities and events. The resulting information enables you to:

- Compare the competencies delivered by training to those required.
- Analyze training efficiency.

Business Questions

Which competencies do courses provide?

Competence Requirement Worksheet

This worksheet displays competence requirements for all organizations within a business group. The worksheet enables you to analyze competence requirements for business groups, organizations, jobs, positions, and grades. For each requirement you

can investigate the:

- Competencies needed for a particular job.
- Skills shortages within an organization.

Business Questions

Which jobs require a particular competence, and at what level?

Headings and Calculations

This worksheet uses the following calculations:

- **Required For**

  Populates the Required For column with the organization and job that require a particular competence.

Person Competence Profile Worksheet

This worksheet enables you to analyze people's competency profiles by type. It enables you to:

- View people with similar competencies.
- Compare people of similar grade.

Business Questions

How proficient is an individual for a particular competence?

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 3-53

Competence Updates after Appraisal Workbook

The Competence Updates after Appraisal Workbook enables administrators and managers to view competence updates, both automatic and manual, made as a result of a completed appraisal. You can view competence updates for all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

Worksheets

This workbook contains two worksheets:

- Competence Updates after Appraisal by Organization Hierarchy
- Competence Updates after Appraisal by Supervisor Hierarchy

Competence Updates after Appraisal by Organization Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, competence names, and new and previous (if any) proficiency levels for each competence.

Business Questions

What competence updates have appraisees in my department received through appraisals?

Parameters

You must enter values for five parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organization
- Start Date
- End Date

Competence Updates after Appraisal by Supervisor Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers under a specified supervisor.

Business Questions

What competence updates have my direct and indirect reports received through appraisals?

Parameters

You must enter values for three parameters:

- Supervisor
- Start Date
- End Date

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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